ADVICENT

NaviPlan User Manual:

Business and Operational Administration

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Chapter 1: Introduction

This chapter introduces you to the user manual and to the NaviPlan Online Administrative Site. It includes the following topics:

Conventions used in this manual **7**

Purpose of the administrative site **8**

Find more information **9**

Conventions used in this manual

This manual uses the following conventions:

- The names of items on the screen are italicized and bolded. For example, the ***Users*** page opens.
- The names of items that you must select, click, or enter appear in bold. For example, make your changes, and then click **Done**.

Purpose of the administrative site

The NaviPlan administrative site is divided into three applications:

- NaviPlan Business Administration.
- NaviPlan Management Reports.
- NaviPlan Operational Administration.

Access to these applications is based on entitlements. You may or may not have access to all three.

NaviPlan Business Administration

The primary purpose of NaviPlan Business Administration is to set up and control access to the NaviPlan online application. If some users will have oversight responsibility over the work of other users or if you plan to use NaviPlan's generic management reports, then you will also use the administrative site to define the hierarchical structure of your organization.

Using NaviPlan Business Administration, you can:

- create and maintain application users.
- create and maintain administrative user profiles.
- create and maintain ownership groups (teams in which all members of the team share ownership of the client).
- reassign clients from one user or user group to another user or user group.
- create the base organization(s) for your company (optional).
- set up organizational units within the organization (optional), and create organizational unit oversight groups.

NaviPlan Management Reports

The primary purpose of NaviPlan Management Reports is to track information about users of NaviPlan Online.

Using NaviPlan Management Reports, you can:

- generate management reports.
- save management report settings.

NaviPlan Operational Administration

The primary purpose of NaviPlan Operational Administration is to manage user activity (manage user sessions and user locks) and perform administrative functions.

Using NaviPlan Operational Administration, you can

- manage timer tasks.
- manage batch processor queues.
- manage current site activities.
- view and modify application settings.
- access the ***XMLStore Processor***.

Find more information

If you have a question that is not addressed in this manual, there are other places to look for additional information.

Help

The quickest way to get information about any command, dialog box, or item within the NaviPlan Online Administrative Site is to use the Help. To access the Help, click the button at the top of the current dialog box or at the bottom of the ***Home*** page.

Learning Center

Find training, support, and additional resources quickly and easily in the NaviPlan Learning Center. Use the Learning Center as your first stop for finding supporting documentation, training opportunities, and the latest updates to NaviPlan.

To access the NaviPlan Learning Center, open the ***Help & Resources*** menu from anywhere in NaviPlan, then select **Learning** Center.

Chapter 2: NaviPlan Business Administration

The NaviPlan Business Administration application allows administrators to set up and control access to the NaviPlan Online application. Administrators can set up and apply user profiles, user groups, and organizational units (optional) to control who can access NaviPlan Online, which parts of the application they can see, and what tasks they can do.

This chapter covers the following topics:

Navigate the NaviPlan Business Administration site 11

Setup NaviPlan Online 12

Manage organizational units 13

Manage user groups 19

Manage templates 23

Manage users 28

Manage clients 42

Enter an XMLStore request 43

Exit the administrative site 44

Navigate the NaviPlan Business Administration site

To open the NaviPlan Business Administration site, click the **NaviPlan Business Administration** link under ***Application Selection*** on the first page that opens when you log into the NaviPlan Online Administration site.

Clicking the buttons at the bottom of the NaviPlan Business Administration main page opens dialog boxes where you can perform the tasks you want to do.

NaviPlan Business Administration main page

The following buttons are available:

Search for users	Add report branding
Search for templates	Manage data integrations
Create or edit organizations/organizational units	Access the Help

Setup NaviPlan Online

When NaviPlan Online is first installed, only one user is defined. This user is an administrator. Before other users can use the application, the administrator must enter them into the administration site. If any users will have oversight responsibility over the work of other users, or if your company is going to use NaviPlan management reports, then you must set up an organizational structure.

To set up NaviPlan Online for your company, follow this process:

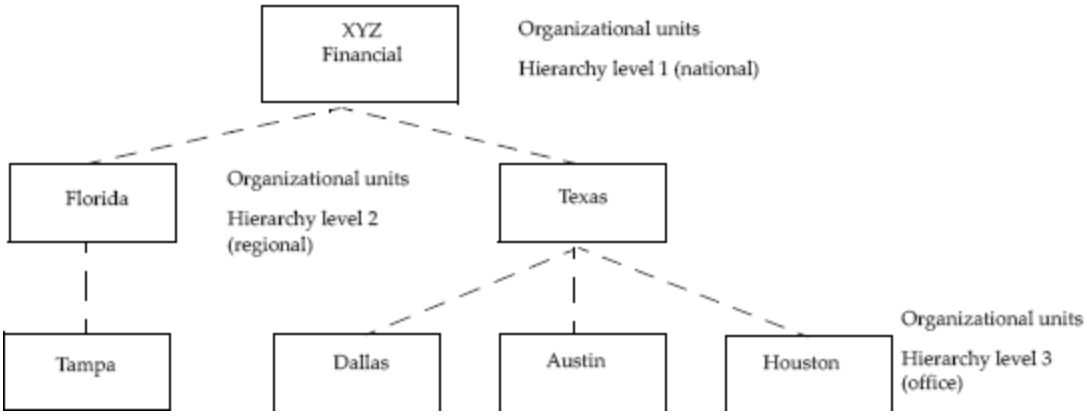
1. Set up the base organization for your company, and then within that organization, create the organizational units you require. For example, you may need a separate organizational unit for each branch of your company. Organizational units may be nested within each other to show your company's hierarchical structure. If your users work independently and no oversight is required, you do not have to enter any organizational units.
   While you set up each organizational unit, set up the oversight user groups with access rights within the organizational unit, and specify what kind of access (read, write, or control) the user groups need.
   For more information about organizations and organizational units, see **Manage organizational units** on the next page. For instructions on creating organizations and organizational units, see **Add organizations** on page 14 and **Add Organizational Units** on page 16.

   Note: You can skip step 1 (setting up an organizational structure) if users will not have oversight responsibility over other users AND your company is not going to use the NaviPlan management reports.
2. Create the user groups you require. For example, you may need separate user groups for teams that manage groups of clients.
   For more information about user groups, see **Manage user groups** on page 19. For instructions on creating user groups, see **Create new user groups** on page 21.
3. Enter other users (the people in your company who will have access to NaviPlan).
   For instructions on entering users and administrators, see **Add new users** on page 30, and **Add new administrators** on page 34.

Manage organizational units

An organizational structure in NaviPlan consists of one or more organizations and a collection of hierarchical units. Each organization can be divided into organizational units representing different parts of the company.

Determine the hierarchical structure of your organization, and then create it in NaviPlan. Each user must belong to one organizational unit, and to all parent units in one direct path up to the highest level. For example, branch manager, Paul Smith may belong to the Florida unit (Heirarchy level 2) and to XYZ Financial (Heirarchy level 1), but not to the Tampa unit (Heirarchy level 3).



Sample organizational structure

Create the base organization first, and then add the organizational units, if required. You must define the organizational structure if:

- Some users are to have oversight access over other users
- You want to use NaviPlan management reports (NaviPlan uses the organizational structures to group data in management reports)

If oversight access is not required (i.e., users work independently) and you are not going to use the NaviPlan management reports, then you do not have to enter any organizational units. For more information about managing organizational units in the

NaviPlan Business Administration Site, see the following procedures:

- **Add organizations** on the next page
- **Add Organizational Units** on page 16
- **Edit organizational units** on page 17
- **Delete organizational units** on page 18

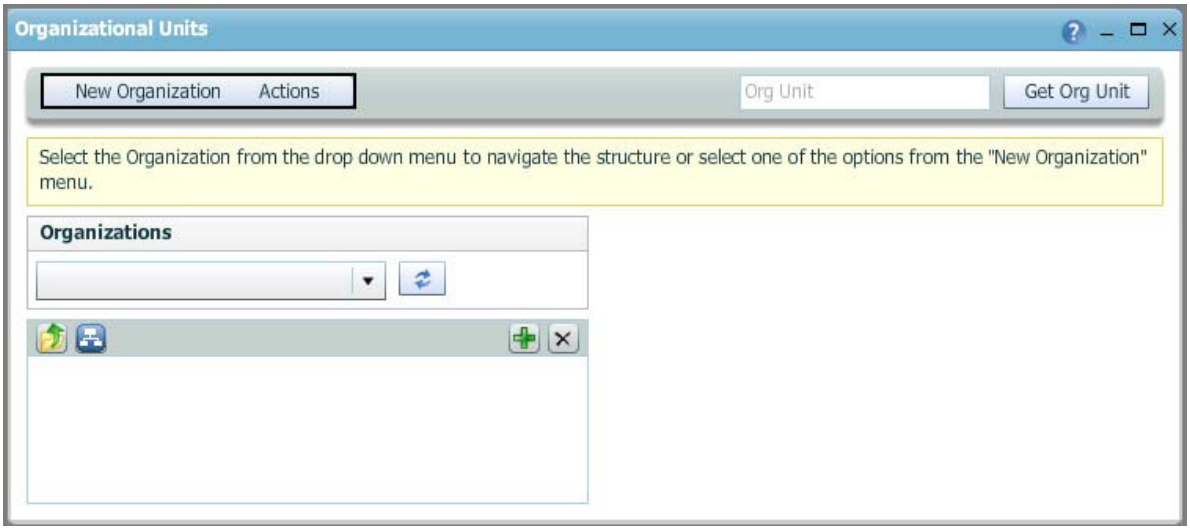
Add organizations

Organizations can be entered manually, or imported.

Add an organization manually

To add an organization manually, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **Organizational Units**.


Organizational Units
New Organization
Actions
Org Unit
Get Org Unit
Select the Organization from the drop down menu to navigate the structure or select one of the options from the "New Organization" menu.
Organizations

NaviPlan Business Administration main page–Organizational Units button–Organizational Units dialog box

2. Click **New Organization**, and then select **Create** from the menu.

NaviPlan Business Administration main page–Organizational Units button–Organizational Units dialog box–New Organization button–Create New Organization dialog box

3. Enter a name and description for the organization, and then click **Create**. The organization is created and saved.

Import an organization

Note: In order to import an organization, you must have the appropriate organization template in XML format.

To import an organization, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **Organizational Units**.
2. Click **New Organization**, and then select **Import** from the list.
3. Paste the template in XML format into the dialog box, and then click **Import**.

The template can include all the organizational units and oversight groups for the organization. They do not have to be imported or entered separately.

Add Organizational Units

If some members of the organization will have oversight responsibility over other members, or if your company is going to use NaviPlan management reports, you must add organizational units to define the hierarchy of your organization.

Note: If you are adding organizational units, each user must belong to one organizational unit, and to all parent units in one direct path up to the highest level.

To add organizational units, and to create the oversight groups within the organizational unit that give read, write, and/or control access to the members of that organizational unit, follow these steps:

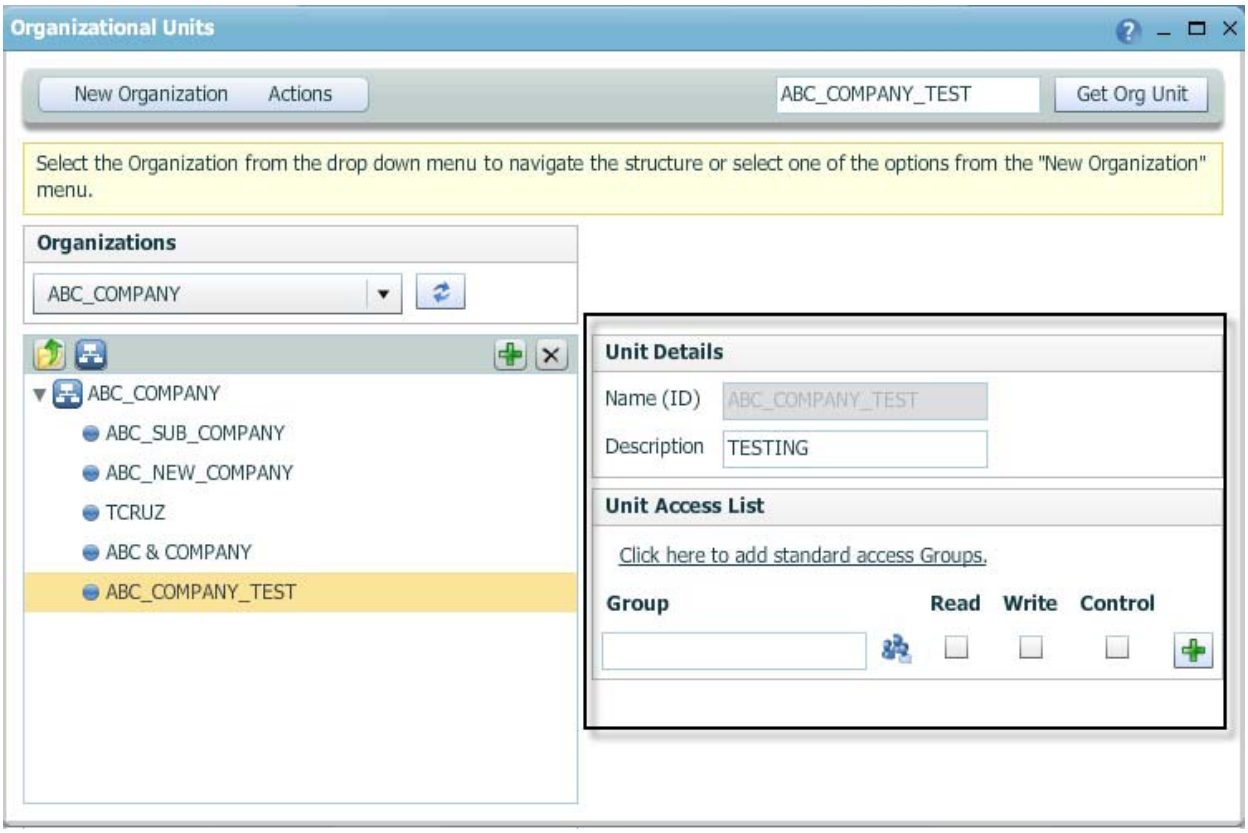
1. Go to the NaviPlan Business Administration main page, and then click **Organizational Units**.
2. Under ***Organizations***, enter or select the name of the parent organization (the organization to which the unit belongs), and then in the section below, click ▸ to the left of the organizational unit name.
3. From the menu of organizational units, select the appropriate parent unit, that is, the organizational unit to which the new unit belongs.
4. Click (**Add Child**).
5. Under ***Create New Unit***, enter a name and description for the new organizational unit, and then click **Create**.
   All organizational unit names must be unique within the entire database. The suggested format is to prefix the name of the organizational unit with a company identifier, (e.g., ABC_DEPT_1).
6. Click the new unit name. Additional fields appear on the right. To create the standard access groups, under ***Unit Access List***, click **Click here to add standard access groups**. The standard ***Read***, ***Read/Write***, and ***Read/Write/Control*** access groups are created.
   - Read access is the right to view a client file and the plans stored within that file.
   - Write access is the right to update and delete a client file and the plans stored within that file.
   - Control access is the right to grant and revoke client access rights and reassign client ownership to other users.
7. To add additional groups to the unit, enter the name of an oversight group that has access to work produced by the unit in the blank field, and then specify what kind of access the group will have (***Read*** access, ***Write*** access, or ***Control*** access).
   Predefined user groups and standard user role groups (for example, ACCESS_NPS and PLANNER) cannot be added to the access list. The user group must belong to the same organization as the organizational unit. If you enter a user group name that does not exist in the database, a new user group with that name is automatically created. Be sure to spell user group names correctly. NaviPlan will not detect spelling errors, and will create new user groups with the misspelled names.
8. Click .
9. Repeat steps 6–8 until you have entered all the user groups with access to work produced by the unit.

Edit organizational units

You can change the description of an existing organizational unit, and you can change the user groups associated with that unit, but you cannot change the unit's name (ID).

To edit an organizational unit, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **Organizational Units**.
2. If you know the name (ID) of the organizational unit, enter it in the ***Org Unit*** field, and then click **Get Org Unit**. Skip to step 4.
   OR
   If you don't know the exact name of the organizational unit, under ***Organizations***, select the name of the parent organization (the organization to which the unit belongs), and then in the section below, click ▸ to the left of the organizational unit name. A list of the units belonging to the specified organization or organizational unit appears.
3. Select the unit you want to edit. The details of the unit appear under ***Unit Details***.
4. Make your changes.



NaviPlan Business Administration main page–Organizational Units button–Organizational Units dialog box (showing unit details)

Delete organizational units

You can delete organizational units in the administration site. However, when you delete an organizational unit, all sub-units are also deleted.

To delete an organizational unit, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **Organizational Units**.
2. If you know the exact name (ID) of the organizational unit, enter it ***Org Unit*** field, and then click **Get Org Unit**. Skip to step 4.
   OR
   If you don't know the exact name of the organizational unit, under ***Organizations***, select the name of the parent organization (the organization to which the unit belongs), and then in the section below, click ▸ to the left of the organizational unit name. A list of the units belonging to the specified organization or organizational unit appears.
3. Select the unit you want to delete.
4. Click ×.
5. Click **OK**.

Manage user groups

A user group is a collection of NaviPlan users grouped together because they have the same access requirements. For example, a user group could be composed of all the users within an organization that need access to certain client files. Each user can be a member of several different user groups. Some user groups are predefined in NaviPlan; others can be created by administrators.

For companies that have multiple organizations defined, every user group created by an administrator must belong to the organization (to ensure each user and group only has access to the appropriate organization).

A separate default user group should be created for each user who will access client files (administrators do not need default user groups). Each default group should have no other members. The default group identifies client files as belonging to that particular user and is required if the user is ever given access to (and not ownership of) another user's client files. Default groups must belong to the same organizations as their users.

You can also create user groups to define "teams," where the team owns the client file and all members of the team have full access to the client file.

Predefined user groups

There are two types of predefined user groups: entitlements and user roles. Entitlements allow users to access specific functionality in the application. User roles define the role that the user fills in the organization (Planner, Approver, or Administrator) and determine the type of access (read/write/control) and workflow capabilities that the user will have.

The following predefined user groups are examples of entitlements:

- **INTERACTIVE_USER** – All users who will access NaviPlan Online must be members of the group.
- **PLANLEVEL2** – All members of this user group can create Level 2 Plans.
  In order to create plans, a user must be a member of the appropriate user group. For example, only users who are members of the PLANLEVEL1 user group can create Level 1 Plans. Separate user groups exist for each plan and assessment level.

The following predefined user groups are examples of standard user role groups:

- **ADMINISTRATOR** – Identifies users who can use the administrative site to manage other users, user groups, and organizational units; to access the administrative site, users must also have the ADMIN branding disposition (for more information see **Add new administrators** on page 34).
- **APPROVER** – Identifies users who can approve or reject plans.
- **PLANNER** – Identifies users who can create and edit client files and plans; users who are not members of this group can only view (and not change) existing client files and plans.

Groups

To use groups, they must first be created in the ***Create Group*** dialog box. A group can be assigned to a user in the ***Create User*** dialog box by entering the additional group name in the blank field under ***Unit Name***, and then clicking **Add** under ***Action***.

Example
Anne Harper's user groups are:

- XYZ_AHARPER_DEFAULT (administrator-created user group belonging to the XYZ organization)
- ACCESS_NPS (predefined user group)
- INTERACTIVE_USER (predefined user group)
- PLANLEVEL2 (predefined user group)
- PLANLEVEL1 (predefined user group)
- PLANNER (standard user role group)

Figure 7: Example of the user groups associated with one user

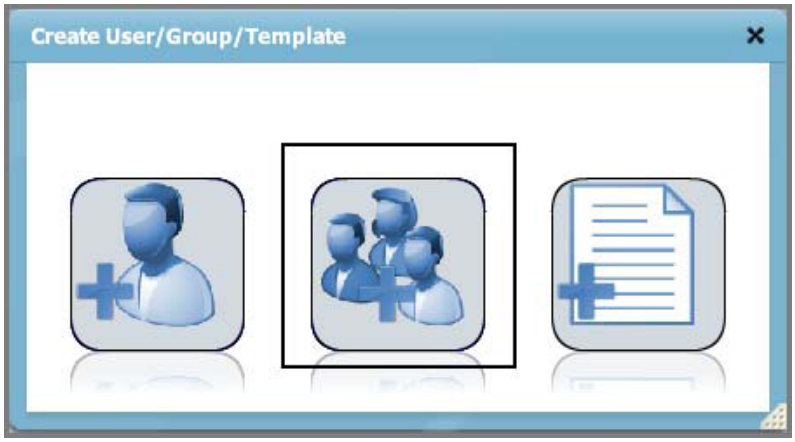
For more information about managing user groups, see the following procedures:

- **Create new user groups** on the next page
- **Edit or delete user groups** on page 22

Create new user groups

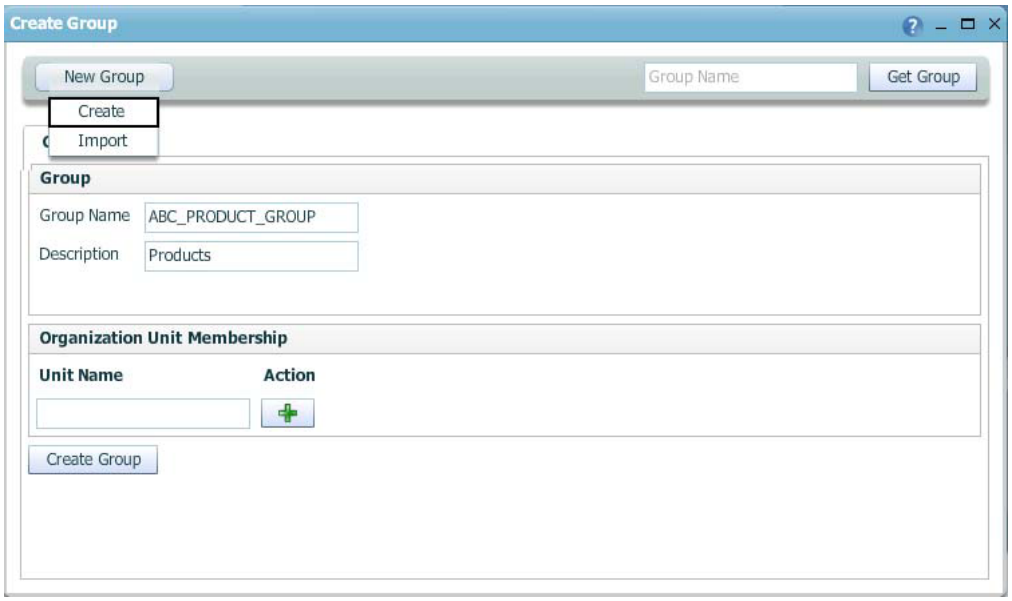
To create a new user group, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **Create User/Group/Template**.



NaviPlan Business Administration main page – Create User/Group/Template button – Create User/Group/Template dialog

2. Click **Create Group**.



NaviPlan Business Administration main page – Create User/Group/Template button – Create User/Group/Template dialog box – Create Group button – Create Group dialog box (showing Create option)

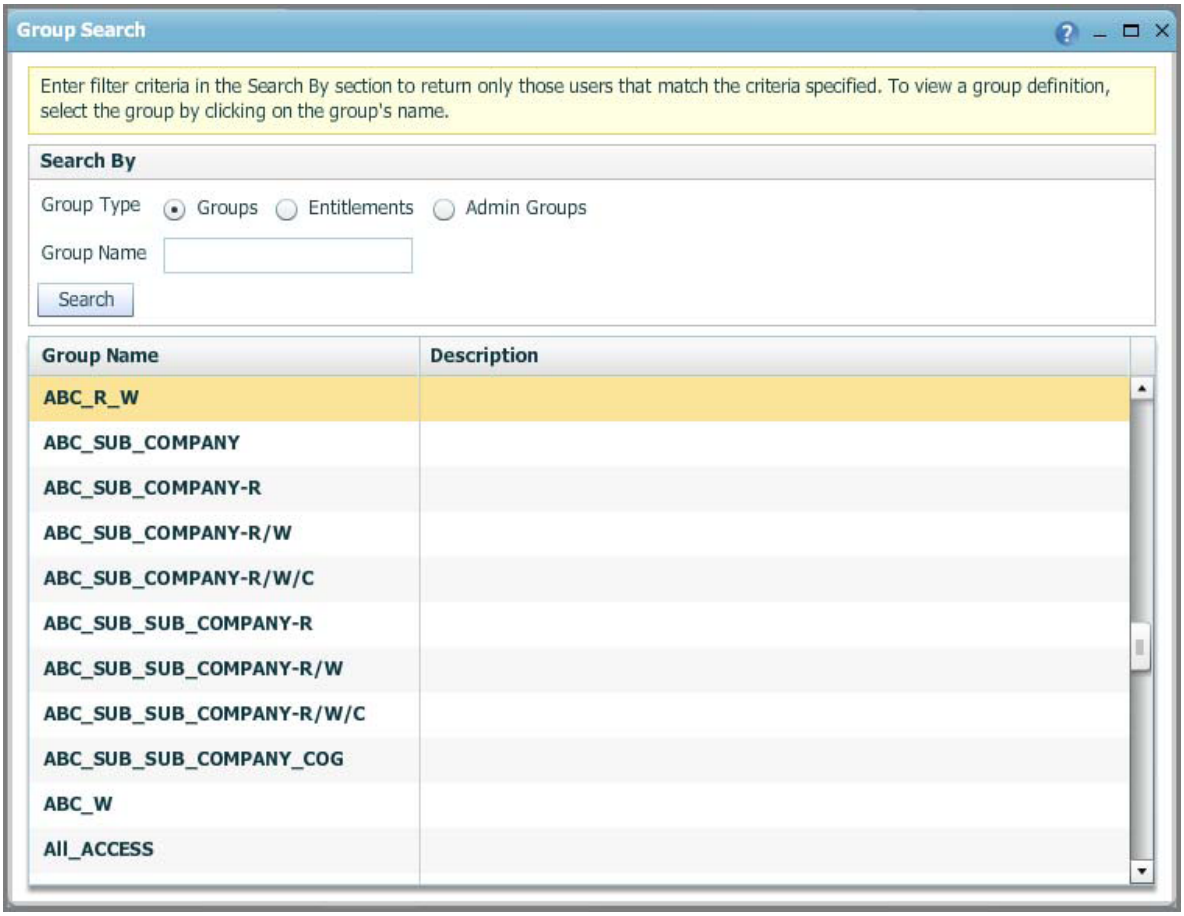
3. Click **New Group**, and then select **Create**.
4. Under ***Group***, enter a group name and description.
   Note: All group names must be unique across the entire database. The suggested format is to prefix the group name with a company identifier, (e.g., ABC_PRODUCT_GROUP).
5. Under ***Organization Unit Membership***, enter the organizational unit to which the user group belongs, and then click .
6. Click **Create Group**.

Edit or delete user groups

To edit or delete a user group, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **Group Search**.
2. Complete any of the following actions:
   - To search for a particular user group, enter the name of that user group in the ***Group Name*** field, and then click **Search**.
   - To generate a list of groups whose names start with a particular letter, enter that letter in the ***Group Name*** field, and then click **Search**.
   - To view a list of all existing groups, click **Search** without entering any criteria. A list of the groups that meet your criteria appears.

   A list of the groups that meet your criteria appears.



NaviPlan Business Administration main page–Group Search button–Group Search dialog box

3. Click the name of the group you want to edit or delete.
   - To edit the user group, make your changes, and then click **Save**.
   - To delete the user group, go to the ***Actions*** menu, and then select **Delete**.

Manage templates

User templates allow you to make changes to an entire group of users in one location, instead of modifying each profile individually. To reduce the amount of time spent creating user profiles, create a template first.

Find templates

The search function enables you to search for templates that exist in the administrative site. Search for templates by entering the template name or user group. To generate a list of names that start with a particular letter, enter that letter in the field.

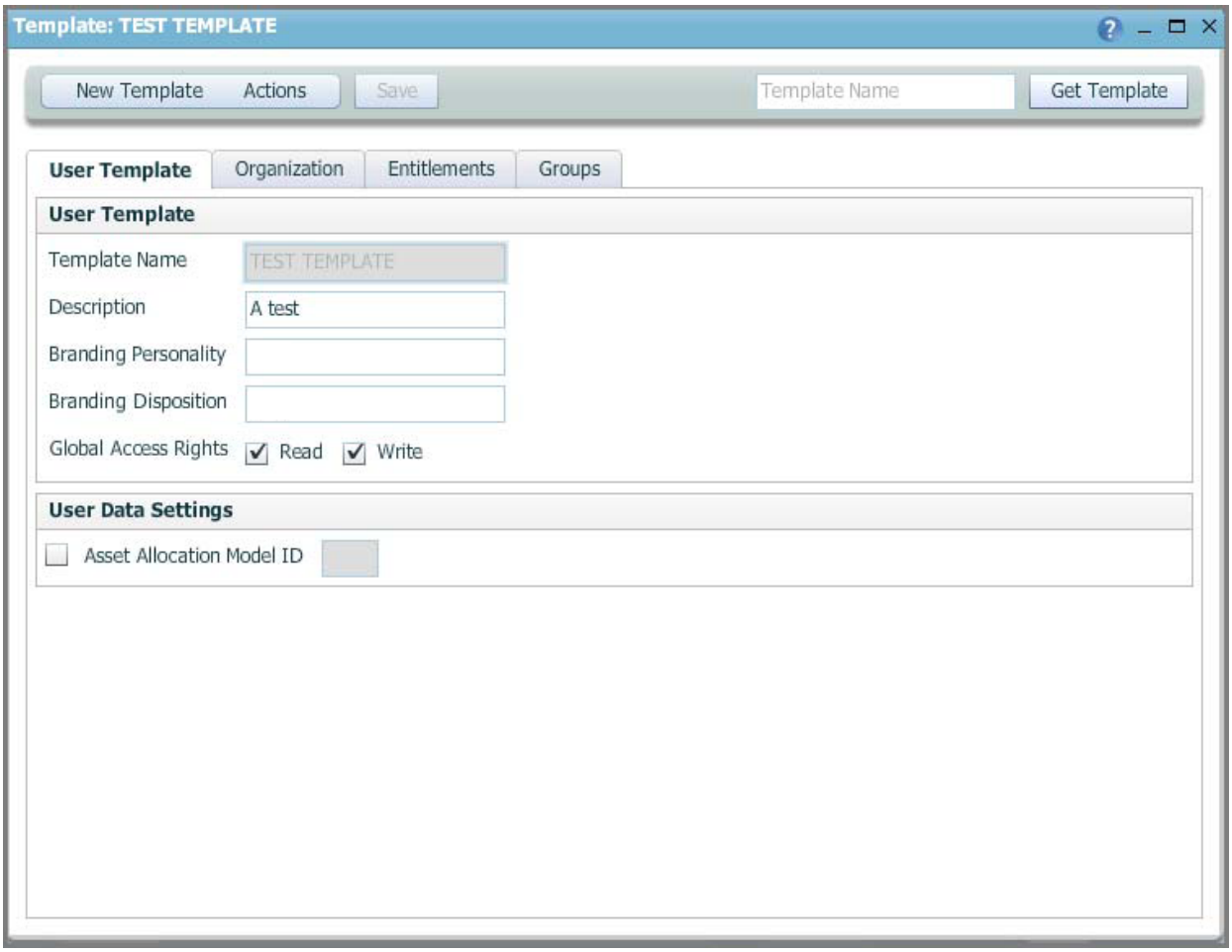
To find a user template, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **Template Search**.
2. Enter the search criteria for a user template. The search criteria can include the template name, user groups specified in the template, or work location. Searching by name is case sensitive. To search for all templates, leave the fields under ***Search By*** blank.
3. Click **Search**.
4. Click the name of the appropriate template.

Add new user templates

To add new user templates, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **Create User/Group/Template**.
2. Click **Create Template**.
3. In the ***Template Name*** field, enter a unique name for the template. The template name cannot be the same as any other template or user name in the database.
4. Under ***User Template***, enter data in the remaining fields as required.
5. Under ***Organization Unit Membership***, enter the units to which users of this template should belong. After entering each name, under ***Action***, click .
6. Click **Create**.



NaviPlan Business Administration main page – Create User/Group/Template button – Create User/Group/Template dialog box – Create Template button –Create Template dialog box – Create button – Template: <new template name> dialog box

Delete templates

Templates cannot be deleted while they are in use by any user. Before a user template can be deleted, you must first remove the template from all user profiles that currently use it.

1. Locate and open the template you want to delete. For more information, see **Find templates** on page 24.
2. Go to the ***Actions*** menu, and then select **Delete**. If the template is not associated with a user profile, it is deleted.

Modify templates

When a user template is changed, every user profile associated with the template is also changed accordingly. This allows you to make changes to an entire group of users in one location, instead of modifying each user profile individually.

To modify templates, follow these steps:

1. Locate the template you want to modify. For more information, see **Find templates** on page 24.
2. To edit template information, go to the **User Template** tab, and then make any necessary changes to the data. Click **Save**.
3. To add organizational units to a template, go to the **Organization** tab, and then in the ***Unit Name*** field, enter the name of the unit to which users of this template should belong (this field is case sensitive). Click . If the organizational unit exists in the database, it is added to the list.
4. To add entitlements to a template, go to the ***Entitlements*** tab, and then in the ***Entitlement Name*** field, enter all or part of the entitlement's name. Select the entitlement to be added to the template, and then click .
5. To add groups to a template, go to the **Groups** tab, and then in the ***Group Name*** field, enter all or part of the group's name. Select the group to be added to the template, and then click .

Manage users

Before any person can use NaviPlan Online, that person must be entered in the administrative site as a user.

NaviPlan Online maintains information about each user of the application in the form of a user profile. This information is used to control access to different parts of the application. Administrators can enter, edit, and delete all this information in the administrative site.

User profiles include the following information:

Name	Country
Language	Password
Planner data	Product support number (PSNs)
Organizational unit membership, if the organization is defined	Entitlements (access to functionality in the application)
User roles (e.g., financial planner, approver, administrator)	Access rights (define the client files to which the user has access)

The user's entitlements, user roles, and access rights are defined through user groups. Each user can be a member of multiple user groups. If an organization is defined then all users should belong to the appropriate organizational units, but only managers should belong to the oversight groups.

For more information about managing users, see the following procedures:

- **Find a user** on the next page
- **Add new users** on page 30
- **Add new administrators** on page 34
- **Export a user profile** on page 35
- **Import a user profile** on page 36
- **User groups: Assign or remove users** on page 38
- **Deactivate, reactivate, or delete users** on page 39
- **Reset user passwords** on page 40
- **Release a locked-out user** on page 41

Find a user

To find a user, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **User Search**.
2. To search for a user who currently has access to NaviPlan Online, select **Active**.
   To search for a user who no longer has access to NaviPlan Online, select **Inactive**.
3. To search for a user with a particular login name or user group, enter that criteria, and then click **Search**. A list of the users who meet your criteria appears.
   When entering criteria, you can use wildcards. For example, to generate a list of users whose login names start with J, enter J* in the ***Login Name*** field.
   To view a list of all users, click **Search** without entering any criteria.

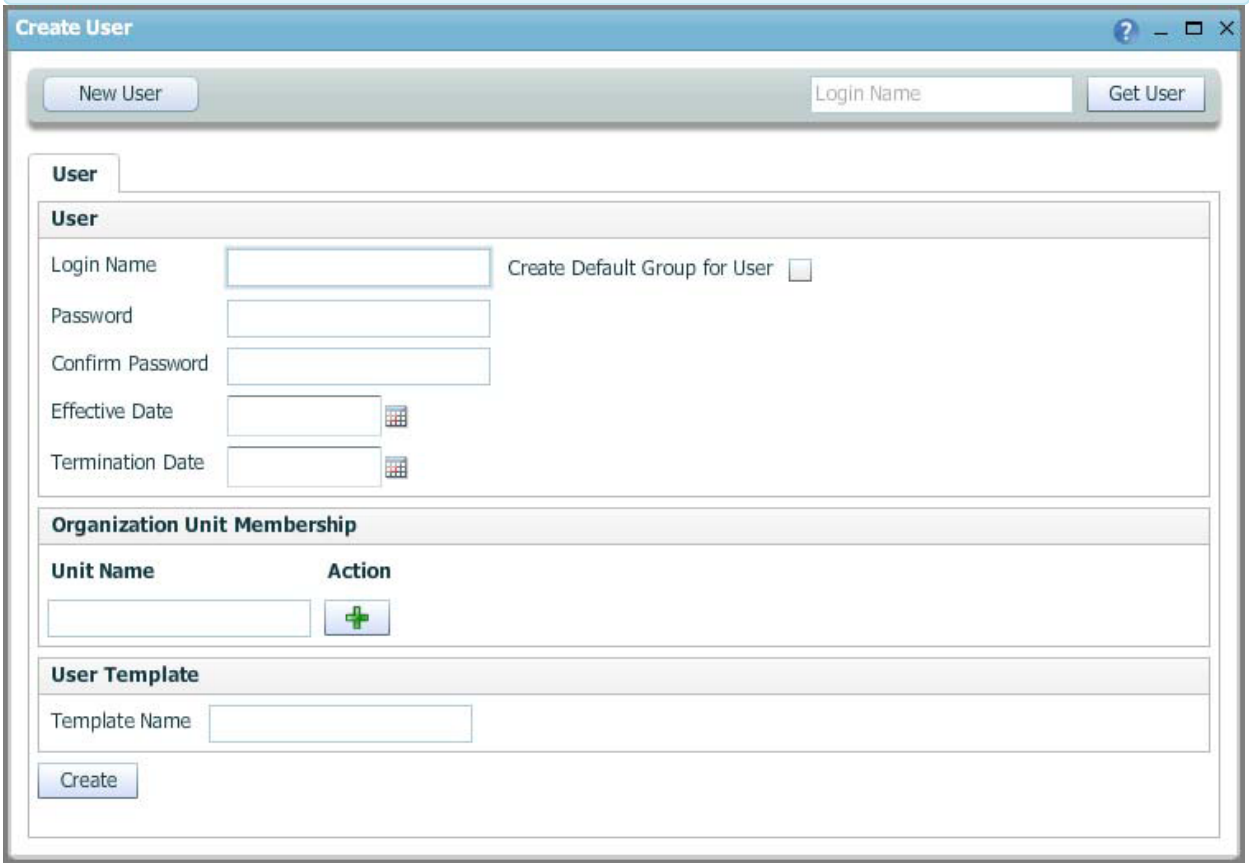
Add new users

New users can be created from scratch or from predefined templates.

Creating a user
To create a user from scratch, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **Create User/Group/Template**.
   Note: If you haven't already done so, it is recommended that you create a template first.
2. Click **Create User**.
3. Under ***User***, enter the details of the new user including the login name, password (must meet the password requirements), effective date, and termination date.
   - Each login name must be unique within the organization(s) set up for your company.
   - If you do not enter a date in the ***Effective Date*** field, the current date and time will automatically be populated when you click **Save**.
   - If you need more information about any item in this dialog box, refer to the ***Help***.

Note: Passwords must be at least eight characters long and must contain three of the following (uppercase letters, lowercase letters, numerals, and/or one of the following characters: !, @, #, $, %, ^, &, *).



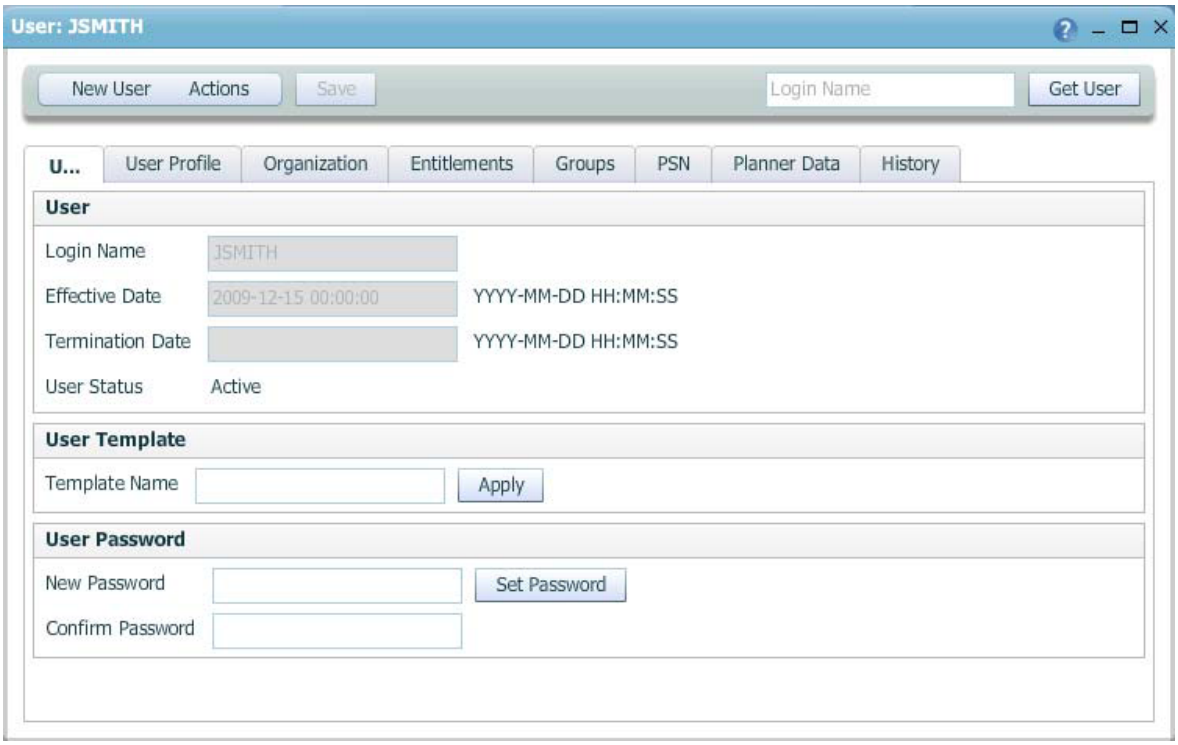
NaviPlan Business Administration main page – Create User/Group/Template dialog box – Create User button – Create User dialog box

4. To create a default group specifically for this user, select the **Create Default Group for User** option.
5. If an organization is defined, under ***Organization Unit Membership***, enter the user's organizational unit, and then click .

> **Note**: Each user must belong to one organizational unit and must also belong to all direct parent units up to the highest level. For more information, see **Manage organizational units** on page 13.

Users cannot be members of more than one organization. For example, Sharon Katz works for the ABC_PLANNING department at the ABC company. She is a member of the ABC organization and the ABC_PLANNING organizational unit. She cannot also be a member of the XYZ organization.

6. Optional: Under ***User Template***, enter the name of a user template. If changes are made to a user template, all users associated with that template update accordingly.
7. Click **Create**.



NaviPlan Business Administration main page – Create User/Group/Template dialog box – Create User button – Create User dialog box – Create button – User: <new user login name> dialog box

8. Go to the ***User Profile*** tab, and then enter the user's information.

9. If the ASSETALLOCATIONCUSTOM entitlement has been assigned to the user, select the Asset Allocation Model ID option under User Data Settings.
   Users with the ASSETALLOCATIONCUSTOM entitlement have custom asset allocation and can edit the custom asset allocation data. Users without this entitlement have user-defined asset allocation and must enter asset allocation data manually.
10. Click **Save** at the top of the dialog box when you are done.
11. Go to the Organization tab. If you haven't already entered the name of the organizational unit the user should belong to, you can enter it in the Unit Name field, and then click .
12. Go to the ***Entitlements*** tab. Entitlements are used to restrict or grant access to certain NaviPlan features. If a user profile does not include an entitlement, the protected feature is not accessible to that user in any plan or assessment level. The top section of this tab displays any entitlements already assigned to the user. The bottom section displays the available entitlements that can be assigned.
    To add an entitlement, scroll through the list and select an entitlement, or enter the name of the entitlement to be assigned to the user in the ***Entitlement Name*** field, and then click . Repeat until all applicable entitlements have been added.
13. Go to the ***Groups*** tab. The top section of this tab displays any groups the user already belongs to. The bottom section displays available groups.

    Note: Standard user role groups are predefined user groups that control which parts of NaviPlan Online each user can access. Users can only belong to predefined user groups and to user groups within the same organization.
14. Under ***Group Name***, select or enter the user groups the user belongs to. After entering each group name, click .
15. If product support numbers (PSNs) apply to your configuration, go to the ***PSN*** tab, and then complete the following steps:
    - Select the online application that the user will access.
    - Enter the product support number for the licensed NaviPlan product in the PSN field,
    - Click .
    - Add a PSN for each application that the user will access.
16. You can specify the planner's name that will appear in reports.

    Example: If you were adding Anne Harper as a new user and Anne was working as an assistant to Larry Fields, you could enter Larry's name and title on the ***Planner Data*** tab. These details would appear instead of Anne's name and title in reports generated by Anne.

    To have another planner's name displayed in reports, go to the ***Planner Data*** tab, and then complete the following steps:
    - Enter the information you want to display in reports.
    - Click **Save**.

17. To review the events performed by the user within a specified time frame, go to the ***History*** tab, and then complete these steps:
    - Click within the **First Event Date** field, and then select a date from the calendar.
    - Click within the **Last Event Date** field, and then select a date from the calendar.
    - Click **Get History**.

Add new administrators

To create an administrator, follow these steps:

1. Go to the NaviPlan Business Administration main page, and then click **Create User/Group/Template**.
2. Click **Create User**.
3. On the ***User*** tab, enter the user details of the new administrator.
   - Each login name must be unique within the organization(s).
   - If you do not enter a date in the ***Effective Date*** field, the current date and time is automatically populated when you click **Save**.
4. Go to the ***User Profile*** tab. In the ***Branding Disposition*** field, enter **ADMIN**. This ensures that the administrative site opens when the new administrator logs on to the NaviPlan Online administrative site.
5. Go to the ***Entitlements*** tab. From the list of entitlements at the bottom of the page, select **ADMINISTRATOR**, and then click .
6. Click **Save**.

Administrators do not require any additional user groups or entitlements. The only entitlement they need is ADMINISTRATOR.

Export a user profile

To speed up the process of adding users, you can export the user profile of one user, modify it to create a template, and then import it every time you want to use that template to add a new user.

User profiles can also be exported and sent to someone else in order to help diagnose problems.

To export a user profile, follow these steps:

1. Go to the NaviPlan Business Administration main page, and click **User Search**.
2. Search for the user whose profile you want to export. See **Find a user** on page 29.
3. Click the login name of the user. Additional tabs appear displaying information about the selected user.
4. Go to the ***Actions*** menu, and then select **Export**.
5. Go to the ***File*** menu, and then select **Save As**.
6. Enter a file name (saving as a text document is recommended), select the directory where the file will be saved, and then click **Save**.
7. Close the dialog box displaying the XML. To create a template, edit the saved profile using a text editor to remove all information specific to the original user (login name, etc.), and then import it.

Import a user profile

You can add new users by importing user profiles using an XML template (see **Export a user profile** on the previous page).

To import a user profile, follow these steps:

1. Open the file containing the user profile of the user you want to import.
2. Select the USER_PROFILE node from the exported profile, and then copy the XML into a text editor, such as Notepad.
3. Go to the NaviPlan Business Administration main page, and click **Create User/Group/Template**.
4. Click **Create User**.
5. Go to the ***New User*** menu, and then select **Import**.
6. Paste the contents of the user profile file into the dialog box.
7. Click **Import User Profile**.

Edit user information

You can use this procedure to edit information about administrators and other users (including their passwords).

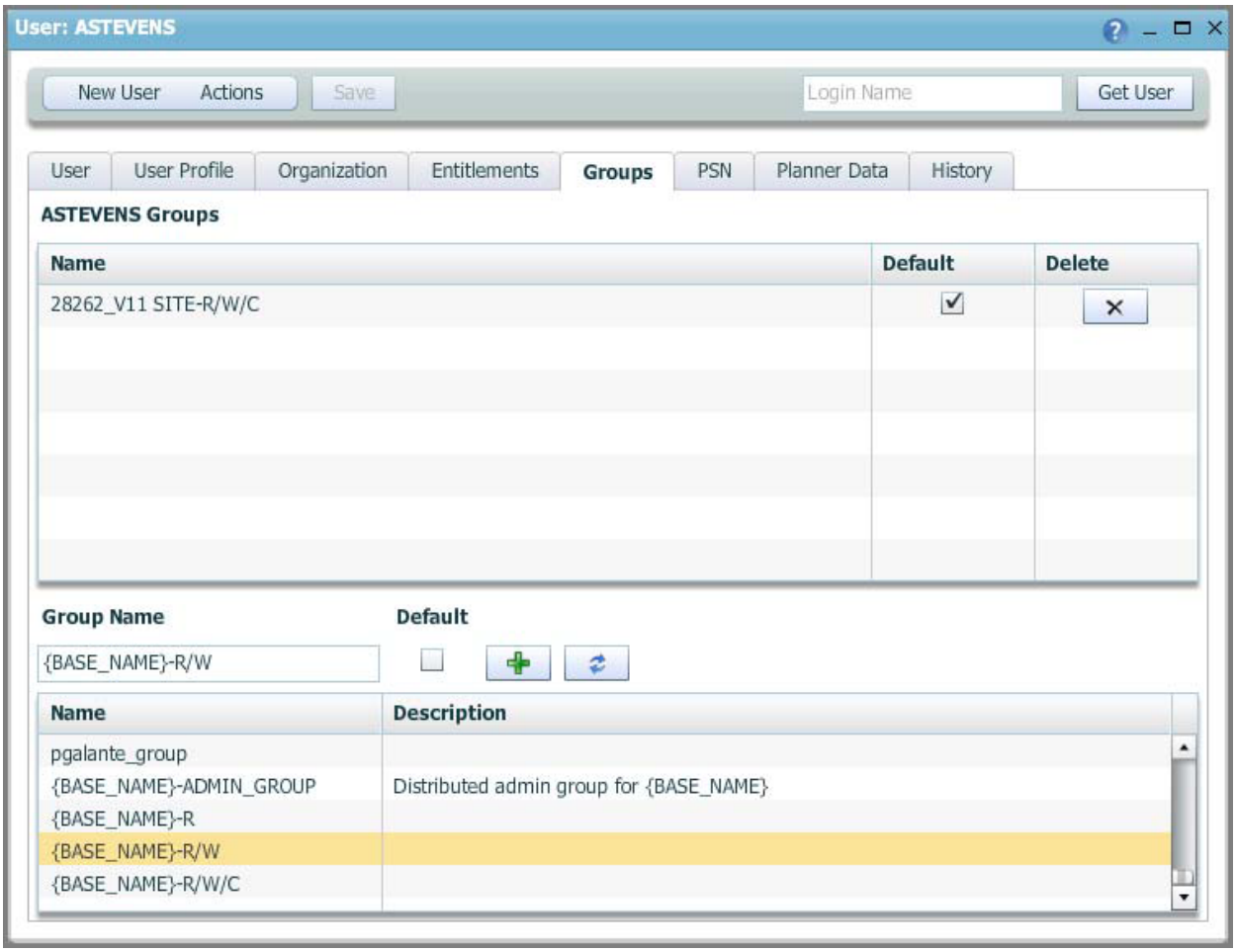
To edit information about a user, follow these steps:

1. Go to the NaviPlan Business Administration main page, and click **User Search**.
2. Search for the user whose information you want to edit. See **Find a user** on page 29.
3. Click the login name of the user.
4. Make your changes, and then click **Save**.

User groups: Assign or remove users

To assign a user to a user group or to remove a user from a user group, follow these steps:

1. Go to the NaviPlan Business Administration main page, and click **User Search**.
2. Search for the user that you want to assign. See **Find a user** on page 29.
3. Click the login name of the user.
4. Go to the ***Groups*** tab.
5. To assign a user to a user group, select the name of the user group from the list (it appears in the ***Group Name*** field), and then click the button.
   To remove a user from a user group, select the user group that you want to remove the user from, and then click the button under ***Delete***.



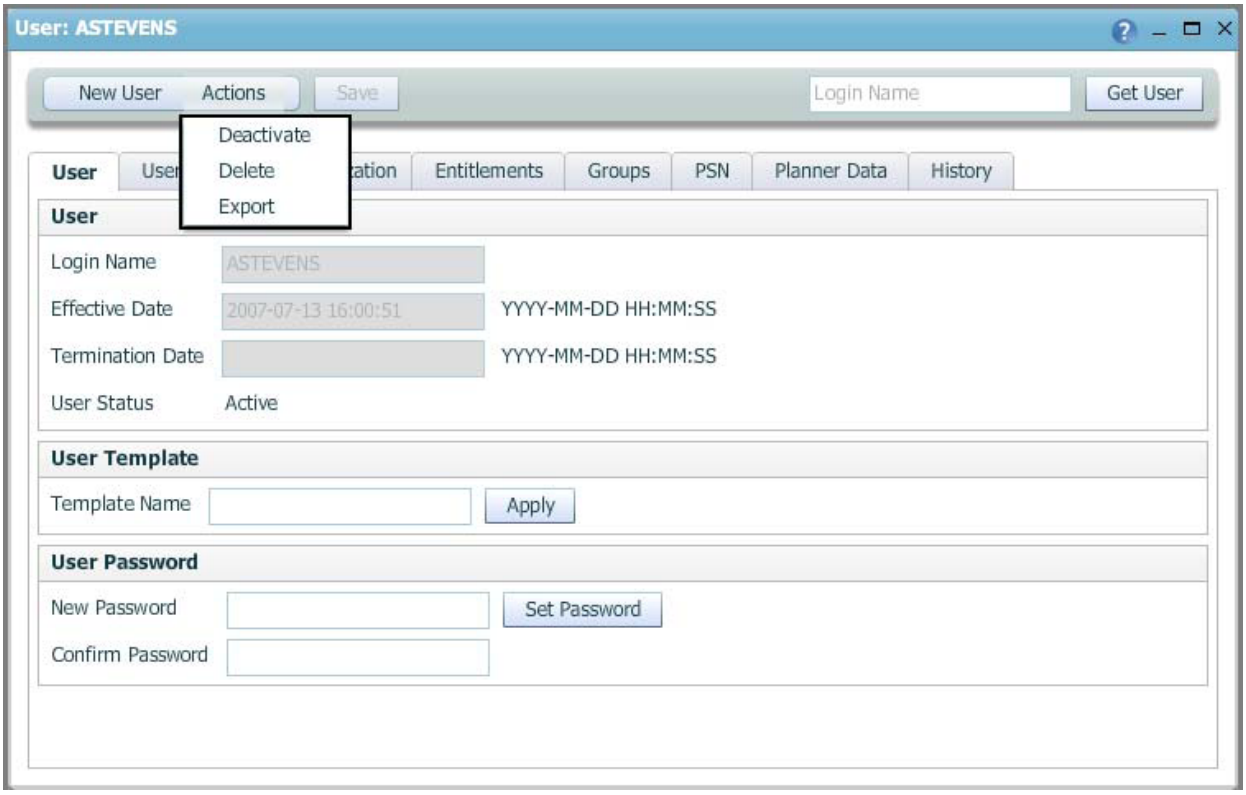
NaviPlan Business Administration main page – User Search button – User: <login name> dialog box – Groups tab

Deactivate, reactivate, or delete users

In the administrative site you can deactivate a user (cancel the user's access to NaviPlan Online without deleting the user's information) or, if the user has already been deactivated and is not referenced in any existing client file or plan, you can delete the user. You can also reactivate an inactive user (give the user the ability to access NaviPlan Online). You cannot reactivate deleted users as they no longer exist in the database. Instead, you must enter them as new users. You can deactivate and delete both administrators and other users.

To deactivate, reactivate, or delete a user, follow these steps:

1. Go to the NaviPlan Business Administration main page, and click **User Search**.
2. Find the user that you want to deactivate, reactivate, or delete. See **Find a user** on page 29.
3. Click the **login name** of the user.
4. Choose one of the following actions:
   - To cancel the user's access to NaviPlan Online, go to the ***Actions*** menu, and then select **Deactivate**.
   - To reactivate an inactive user, go to the ***Actions*** menu, and then select **Activate**.
   - To remove the user's information from the administrative site, go to the ***Actions*** menu, and then select **Delete** (the user must already be deactivated).



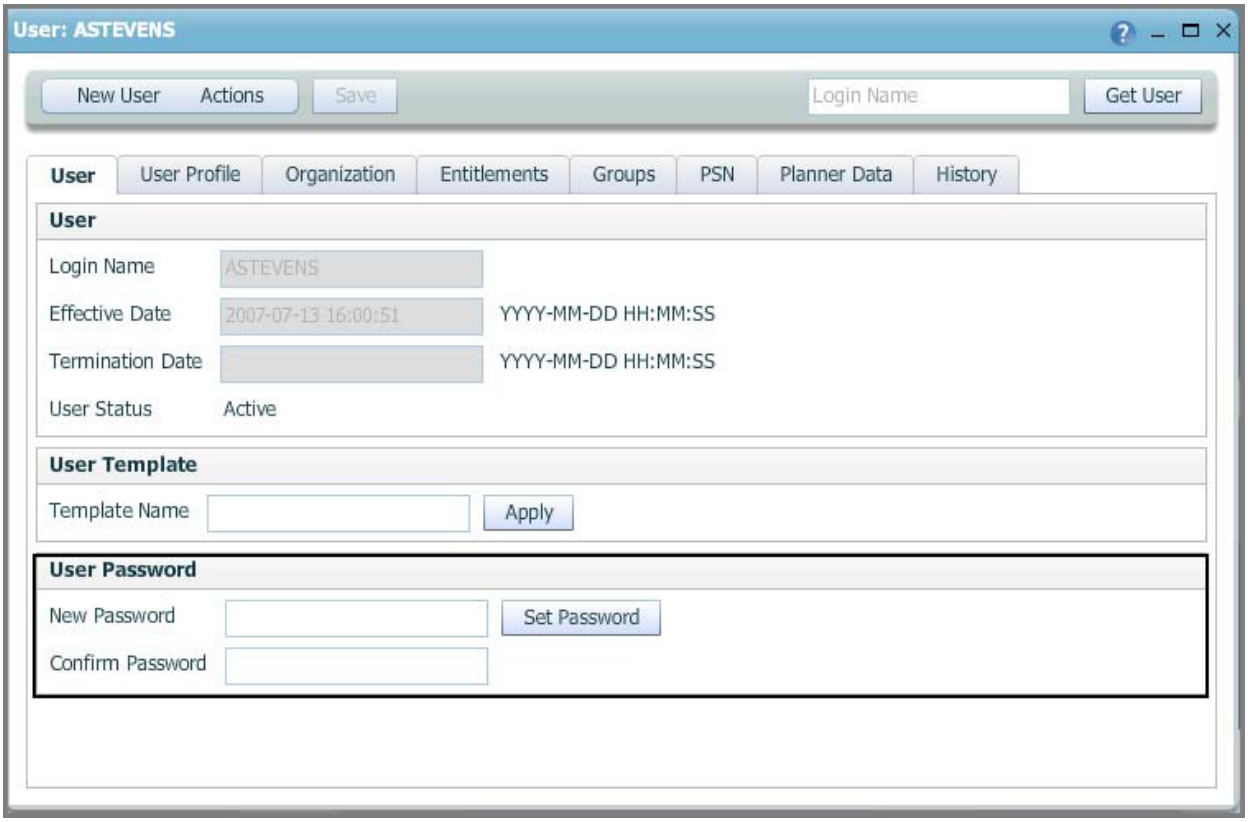
NaviPlan Business Administration main page – User Search button – User: <login name> dialog box – User tab (showing Actions menu)

Reset user passwords

When users forget their NaviPlan login passwords, administrators cannot tell them what their passwords are, but they can assign new ones.

To reset a password, follow these steps:

1. Go to the NaviPlan Business Administration main page, and click **User Search**.
2. Select **Active**.
3. Find the user whose password you want to reset. See **Find a user** on page 29.
4. Click the **login name** of the user.
5. Under ***User Password***, enter a new password twice, once in the ***New Password*** field and once in the ***Confirm Password*** field.
6. Click **Set Password**.

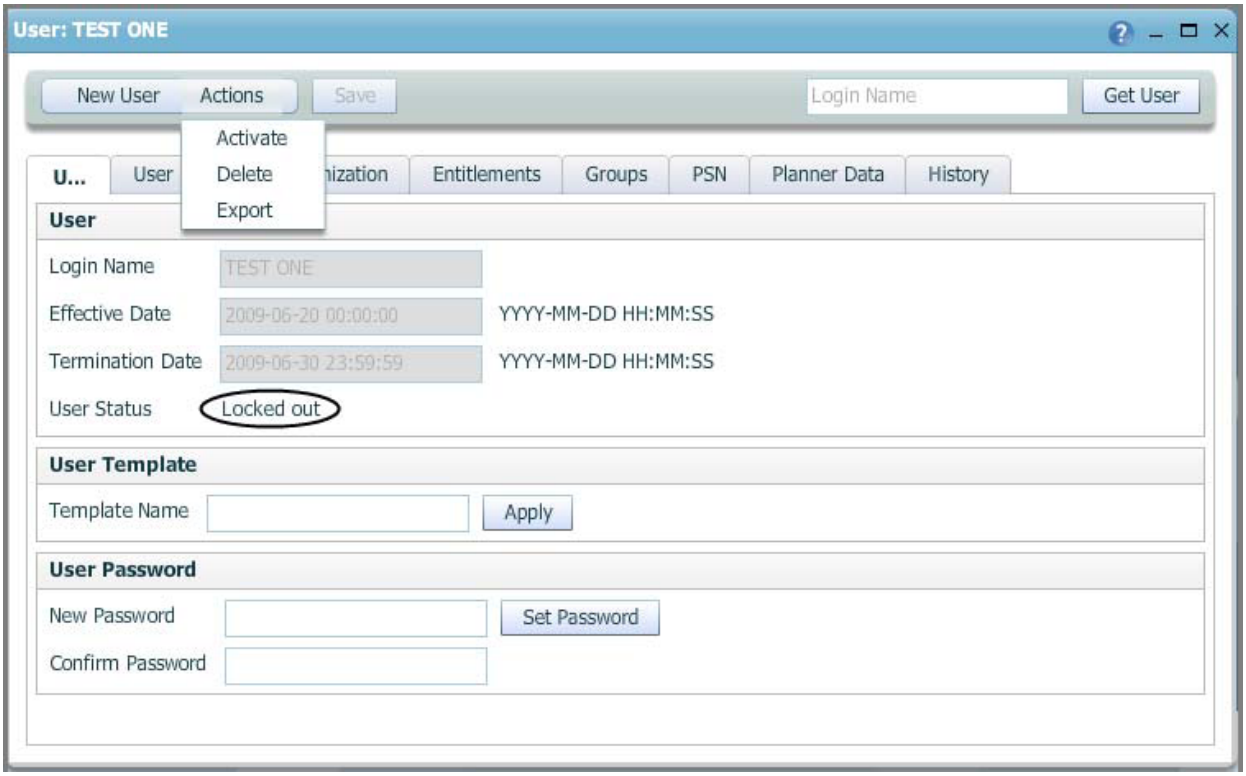


NaviPlan Business Administration main page – User Search button – User: <login name> dialog box (showing User Password section)

Release a locked-out user

To release the lock for a user who has been locked out of the application, follow these steps:

1. Go to the NaviPlan Business Administration main page, and click **User Search**.
2. Find the user. See **Find a user** on page 29.
3. Click the **login name** of the user.
4. Verify that the user status is set to ***Locked out***.
5. Go to the ***Actions*** menu, and then select **Activate** to clear the ***Locked out*** user status.



NaviPlan Business Administration main page – User Search button – User: <login name> dialog box (showing Locked out user status)

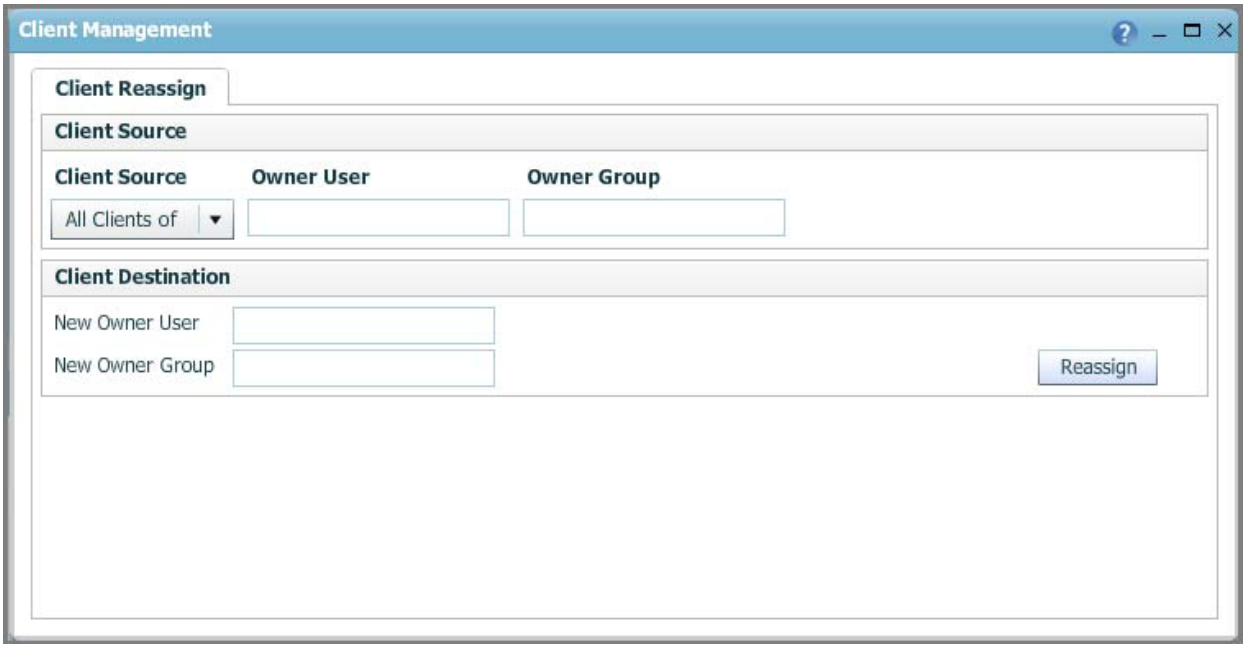
Manage clients

Reassign clients to another user

In the ***Client Management*** dialog box, you can reassign clients from one user to another and from one user group to another. Both users and user groups must belong to the same organization.

To reassign clients to another user, follow these steps:

1. Go to the NaviPlan Business Administration main page, and click **Client Management**.
2. Choose one of the following:
   - To reassign all the clients belonging to one user, under ***Client Source*** select **All clients of**, and then enter that user's login name in the ***Owner User*** field.
   - To reassign all the clients belonging to a user group, under ***Client Source*** select **All clients of**, and then enter the user group name in the ***Owner Group*** field.
   - To reassign a single client, under ***Client Source*** select **Single client**.
3. Choose one of the following:
   - To reassign the client(s) to a single user, enter that user's login name in the ***New Owner User*** field under ***Client Destination***.
   - To reassign the client(s) to a user group, enter the user group name in the ***New Owner Group*** field under ***Client Destination***.
4. Click **Reassign**.



NaviPlan Business Administration main page – Client Management button – Client Management dialog box

Enter an XMLStore request

Clicking ***XMLStore Processor*** on the NaviPlan Business Administration main page opens the ***XMLStore Processor*** dialog box where you can enter an XMLStore request.

There are three methods you can use to enter an XMLStore request:

- Manually enter the request in the text box, and click **Process XML**.
- Copy the request from an external XML file, paste it in the text box, and click **Process XML**.
- Click **Browse** to browse for an existing XML file, select it, and click **Submit**.

Exit the administrative site

To exit the administrative site and save changes, click **Logout** in the top-right corner of the screen. Do not close your browser without logging off first, or any changes made on the last screen you worked on may not be saved.

Chapter 3: NaviPlan Management Reports

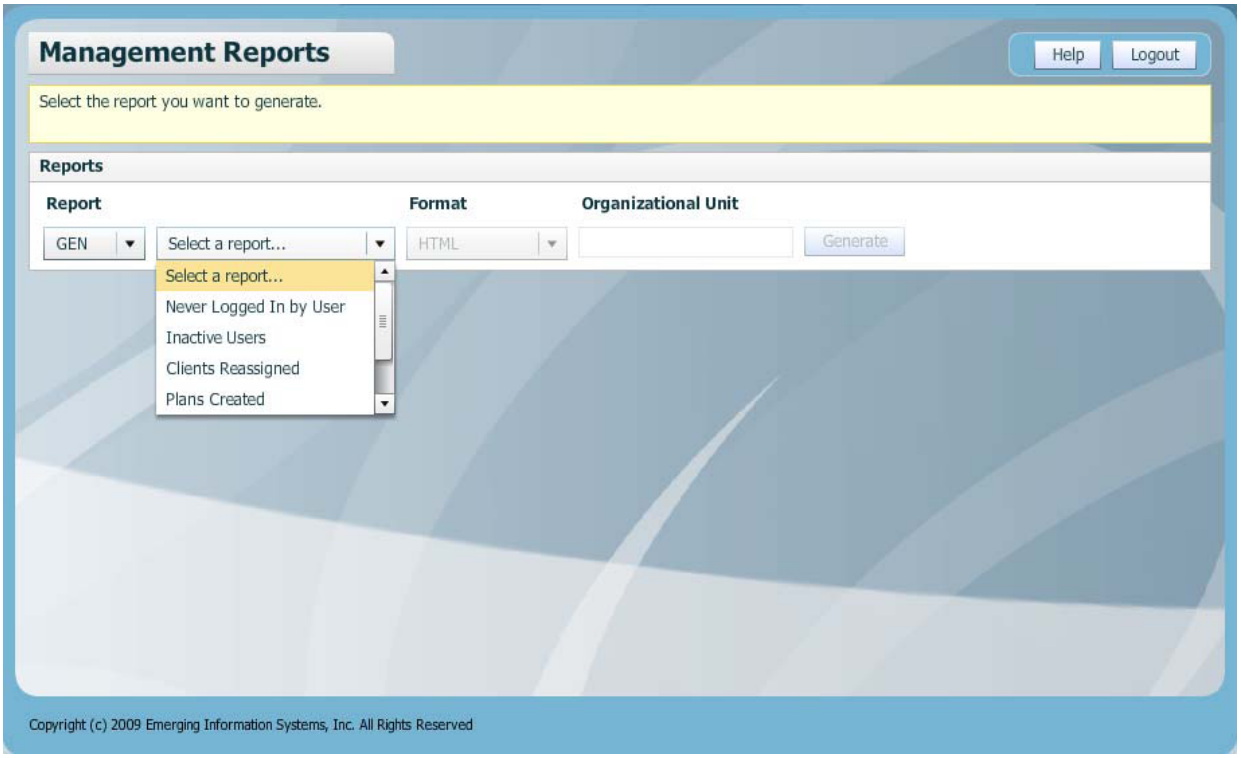
This chapter covers the following topics:

NaviPlan Management Reports **46**

NaviPlan Management Reports

If you are using the NaviPlan Central database as your application server and you have the appropriate permissions to access management reports, you can generate management reports.

Clicking the **NaviPlan Management Reports** link on the first page that opens when you log on to the NaviPlan Online Administration site opens the ***Management Reports*** dialog box, where you can generate management reports and save management report settings.



Management Reports dialog box

The management reports provide you with data that you have organizational access to, but nothing else. For example, if you have oversight responsibilities for Division A but not Division B, the management reports will provide data from Division A users only. Depending on your user permissions, you may have access to some or all of the management reports. See your administrator if you have any questions about your user permissions.

- Using management reports, you can view information about
- Inactive users (users who have not logged on to NaviPlan within a specified number of days)
- Users who have never logged on (those not using the software)
- Clients who have been reassigned to new owners
- Plans in stage (plans in a specified workflow stage on the date the report is generated)
- Plans in stage for days (plans in a specified workflow stage for a specified number of days on the date the report is generated)
- Plans created (plans created within a specified period grouped by office branch)

These reports do not report on a particular client or plan.

The table on the following pages shows management report details. For information about generating management reports, see **Generate management reports** on page 52. For information about saving report settings, see **Save management report settings** on page 53.

Report name and details	Available report settings	Report output
Never Logged in by User The ***Never Logged in by User*** report lists users who have never logged on to NaviPlan. Data is ordered by the user names of the individuals who have never logged on to NaviPlan. This report groups data by organizational level with subtotals for each level.	**You can select:** ***Organizational Unit*** – The specific organizational level to report on.	***User ID*** – The ID of the person who has never logged on to NaviPlan. ***Last Name*** and ***First Name*** – The last and first name of the person who has never logged on to NaviPlan. ***Total results from organizational unit for user accounts never activated*** – The total number of user accounts never activated, as of the report date.
No Activity by User The ***No Activity by User*** report provides a list of users who have not logged on to NaviPlan within a specified number of days. Data is ordered by the date a user last logged on to NaviPlan, and is grouped by organizational level with subtotals for each level.	**Settings:** ***Organizational Unit*** – The specific organizational level to report on. ***Inactive Days*** – The number of days since the user last logged on. The maximum value is 2000.	***User ID*** – The ID of the person who has not logged on to NaviPlan within the specified number of days. ***Last Name*** and ***First Name*** – The last and first name of the person who has not logged on to NaviPlan within the specified number of days. ***Last Login Date/Time*** – The date and time the user last logged on. ***Days Inactive*** – The number of days since the user last logged on. ***Total results from organizational unit for accounts inactive for XX+ days: NN*** – The total number of user accounts that are inactive for the specified number of days or more, as of the report date.

Report name and details	Available report settings	Report output
Clients Reassigned The ***Clients Reassigned*** report lists clients who have been reassigned to new owners during the selected period.	**You can select:** ***Organizational Unit*** – The specific organizational level to report on. ***Application*** – The NaviPlan application that was used to create the plan. ***Start Date*** – The beginning of the reporting period. ***End Date*** – The end of the reporting period. ***Order By*** – Specifies how to group the report data.	***Client ID*** – The ID of the client being reassigned to a different owner. ***Client Name*** – The name of the client being reassigned to a different owner. ***User Name*** – The name of the user who is reassigning the client. ***Previous Owner*** – The owner of the client before the reassignment. ***Owner*** – The new owner of the client after the reassignment. ***Comment*** – Related information. ***Event Time*** – When the client was reassigned. ***Application*** – The NaviPlan application that was used to create the client. ***Total Clients Reassigned*** – The total number of clients that have been reassigned.
Client Plans Created For the Period The ***Client Plans Created For the Period*** report lists the plans created within a specified time period. Data is grouped by organizational level with subtotals provided for each level, and ordered by the date on which the plan was created.	**You can select:** ***Organizational Unit*** – The specific organizational level to report on. ***Application*** – The NaviPlan application that was used to create the plan. ***Start Date*** – The beginning of the reporting period. ***End Date*** – The end of the reporting period. ***Order By*** – Specifies how to group the report data.	***Owner*** – The person who owns the plan. ***Client Name*** – The name of the client. ***Plan Name*** – The name that identifies the plan. ***Create Date/Time*** – The date the plan was created. ***Application*** – The NaviPlan application that was used to create the plan. ***Total Client Plans Created*** – The number of plans created for the specified period.

Report name and details	Available report settings	Report output
Plans in <workflow stage> Stage The ***Plans in <workflow stage> Stage*** report lists plans in a specified workflow stage, as of the report generation date. Data is grouped by organizational level, with subtotals provided for each level. Within each grouping, data is further grouped by owner and ordered by the date the plan entered the workflow stage.	**You can select:** ***Organizational Unit*** – The specific organizational level to report on. ***Application*** – The NaviPlan application that was used to create the plan. ***Workflow Stage*** – The workflow stage to be reported on.	***Owner*** – The person who owns the plan. ***Client Name*** – The name of the client. ***Plan Name*** – The name that identifies the plan. ***Plan Type*** – The assessment or plan level. ***Plan Status*** – The workflow stage or status of the plan. ***Stage Entry Date/Time*** – The date the plan entered the specific workflow stage. ***Application*** – The NaviPlan application that was used to create the plan. ***Total results from organizational unit for application*** – The total number of plans in a workflow stage for the given application, as of the report date. **Note:** When a plan has been in a specific workflow stage more than once, the most recent date the plan entered that stage appears in the report. Plans created using NaviPlan Offline are included in the results. The ***Stage Entry Date/Time*** reports when a plan created in Offline is checked into the Online application.

Report name and details	Available report settings	Report output
Plans in <workflow stage> Stage for <number> Days The ***Plans in <workflow stage> Stage for <number> Days*** report provides a list of plans that are in a specified workflow stage for a specified number of days or more, as of the report generation date. Data is grouped by organizational level and owner, and ordered by the date the plan entered the workflow stage. Subtotals are provided for each level.	**You can select:** ***Organizational Unit*** – The specific organizational level to report on. ***Application*** – The NaviPlan application that was used to create the plan. ***Workflow Stage*** – The workflow stage to be reported on. ***Days*** – A total number of days. Plans in a specific stage for this number of days or more will be reported. The maximum value is 2000.	***Owner*** – The person who owns the plan. ***Client Name*** – The name of the client. ***Plan Name*** – The name that identifies the plan. ***Plan Type*** – The assessment or plan level. ***Plan Status*** – The workflow stage or status of the plan. Stage Entry Date/Time – The date the plan entered the specific workflow stage. ***Days In Stage*** – The number of calendar days a plan has been in the current workflow stage, as of the report date. ***Application*** – The NaviPlan application that was used to create the plan. ***Total results from organizational unit for application*** – The total number of plans in a workflow stage for a specified number of days or more, as of the report date. **Note:** When a plan has been in a specific workflow stage more than once, the most recent date the plan entered that stage appears in the report. Plans created using NaviPlan Offline are included in the results. The Stage Entry Date/Time reports when a plan created in Offline is checked into the Online application.

Generate management reports

1. On the administrative site main page, click the **NaviPlan Management Reports** link.
2. From the ***Report list***, select one of the following options:
   - ***GEN*** – lists the generic reports that exist in the Management Reports package.
   - ***Custom*** – lists the available customized reports (if any).
   - ***Saved*** – lists reports that were previously generated and saved.
3. From the ***Select a report*** menu, select the report you would like to generate.
4. From the ***Format*** menu, select the appropriate format for the report.
5. If available, from the ***Organizational Unit*** menu, select the appropriate option. Otherwise, enter the appropriate name in the ***Organizational Unit*** field.
6. Depending on the report selected, additional data-entry fields may appear under ***<report name> Report Settings***.
   Note: A valid report must be selected before this section of the dialog box appears.
7. Click **Generate**.

Save management report settings

1. Follow the steps in the previous procedure, see **Generate management reports** on the previous page.
2. Under ***<report name> Report Settings***, select the settings you want to use, and then click Save.
3. In the ***Name*** field, enter an appropriate name.
4. Click **Save**. The report settings you saved will now be available when you select ***Saved*** from the ***Report list***.

Chapter 4: NaviPlan Operational Administration

To open the NaviPlan Operational Administration site, click the NaviPlan Operational Administration link under Application Selection on the first page that opens when you log into the NaviPlan Online Administration site. The NaviPlan Operational Administration main page opens.

Clicking the buttons at the bottom of the NaviPlan Operational Administration main page opens dialog boxes where you can perform the tasks you want to do.

This chapter covers the following topics:

NaviPlan Operational Administration main page **55**

Manage timer tasks **56**

Manage batch processor queues **60**

Manage current site activities **65**

View and modify application settings **71**

Enter an XMLStore request **72**

Exit the administrative site **73**

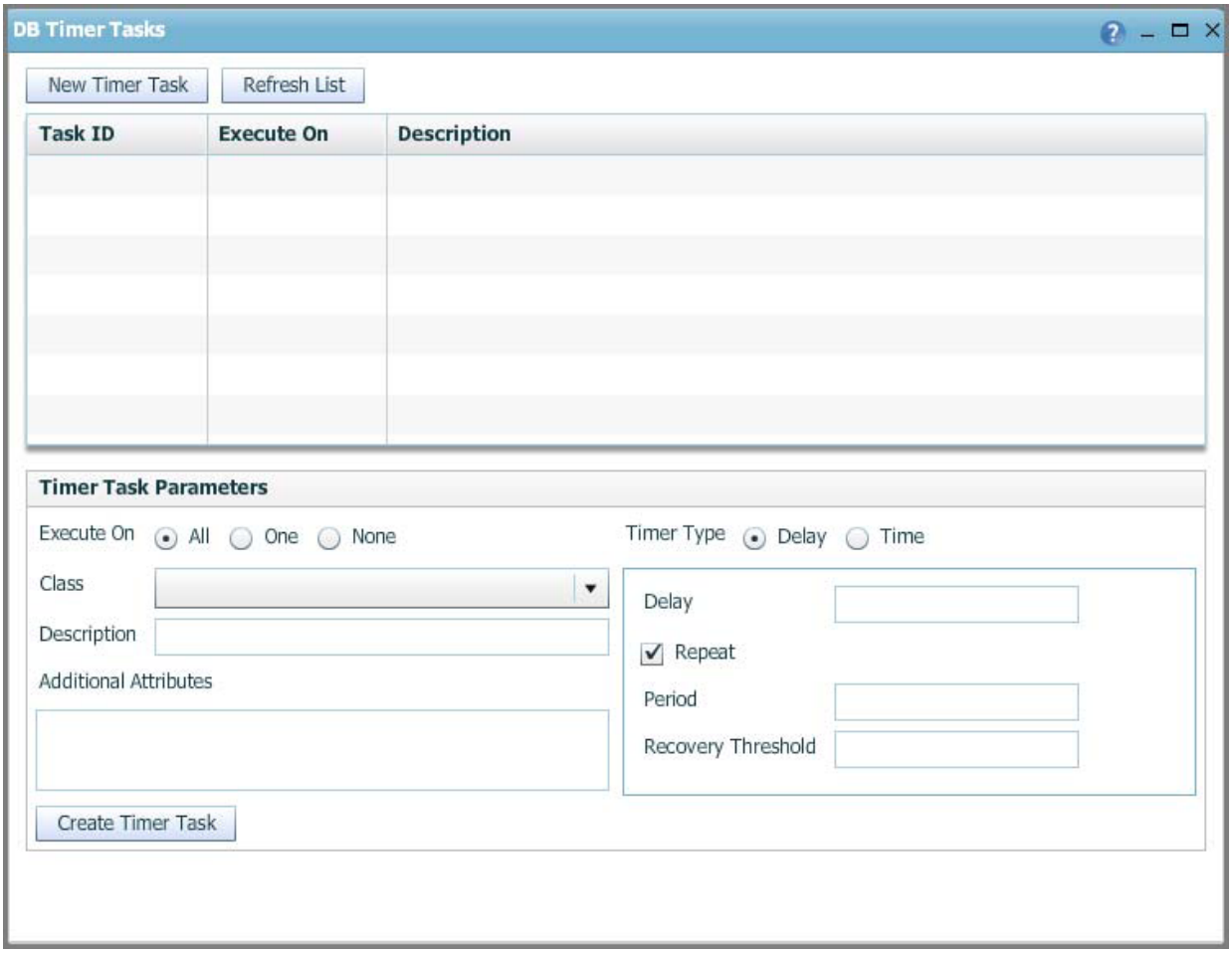
NaviPlan Operational Administration main page

NaviPlan Operational Administration main page

Manage timer tasks	Manage batch processor priority queues
Manage current activity	Perform administrative functions
Access the XMLStore Processor	Get Help using the application

Manage timer tasks

Clicking ***DB Timer Tasks*** on the NaviPlan Operational Administration main page opens the ***DB Timer Tasks*** dialog box where you can view, create, modify, and delete tasks that can be run at different times. You can also view a list of all the existing timer tasks.



NaviPlan Operational Administration main page – DB Timer Tasks button – DB Timer Tasks dialog box

Create a new timer task

1. Go to the NaviPlan Operational Administration main page, and click **DB Timer Tasks**.
2. Click **New Timer Task**.
3. Enter the timer task configuration details.
4. Click **Create Timer Task**.

Update a timer task

1. Go to the NaviPlan Operational Administration main page, and click **DB Timer Tasks**.
2. Select the timer task you want to update in the upper section of the dialog box.
3. Update the timer task details, and click **Update Timer Task**.
4. If the timer task contains inner XML, an XML button appears next to ***Additional Attributes*** in the ***DB Timer Tasks*** dialog box.
   - To view or edit the inner XML, click **XML**,view or edit the inner XML as required, and then click **OK**.

Delete a timer task

1. Go to the NaviPlan Operational Administration main page, and click **DB Timer Tasks**.
2. From the list of tasks in the upper section of the dialog box, select the timer task that you want to delete, and then click **Delete Timer Task**.

Manage batch processor queues

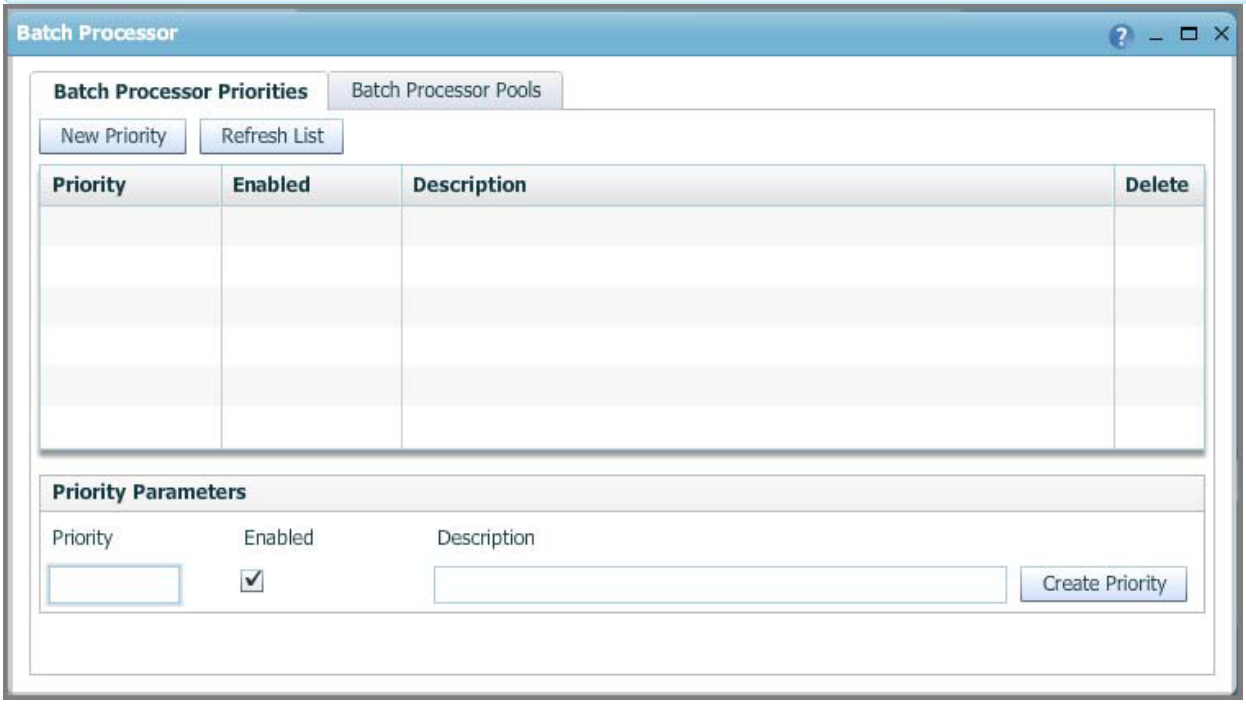
The ***Batch Processor*** dialog box allows you to create, view, modify, and delete batch priority queues and processor pool configurations. This dialog box also allows you to start and stop batch processor pools.

The ***Batch Processor*** dialog box has two tabs: ***Batch Processor Priorities*** and ***Batch Processor Pools***.

Batch processor priorities

A batch priority must be created before you can assign batch processor pools to that priority. In this dialog box, you can enable or disable an entire priority queue from processing requests.

Note: Disabling a priority queue does not stop the associated processor pools, but stops those pools from processing any future requests. Any requests that are currently running will continue processing.



NaviPlan Operational Administration main page – Batch Processor button – Batch Processor dialog box – Batch Processor Priorities tab

Create a new batch processor priority

1. Go to the NaviPlan Operational Administration main page, and click **Batch Processor**.
2. Click **New Priority** at the top of the dialog box.
3. Enter the new batch priority configuration details.
4. Click **Create Priority**.

Update a batch processor priority

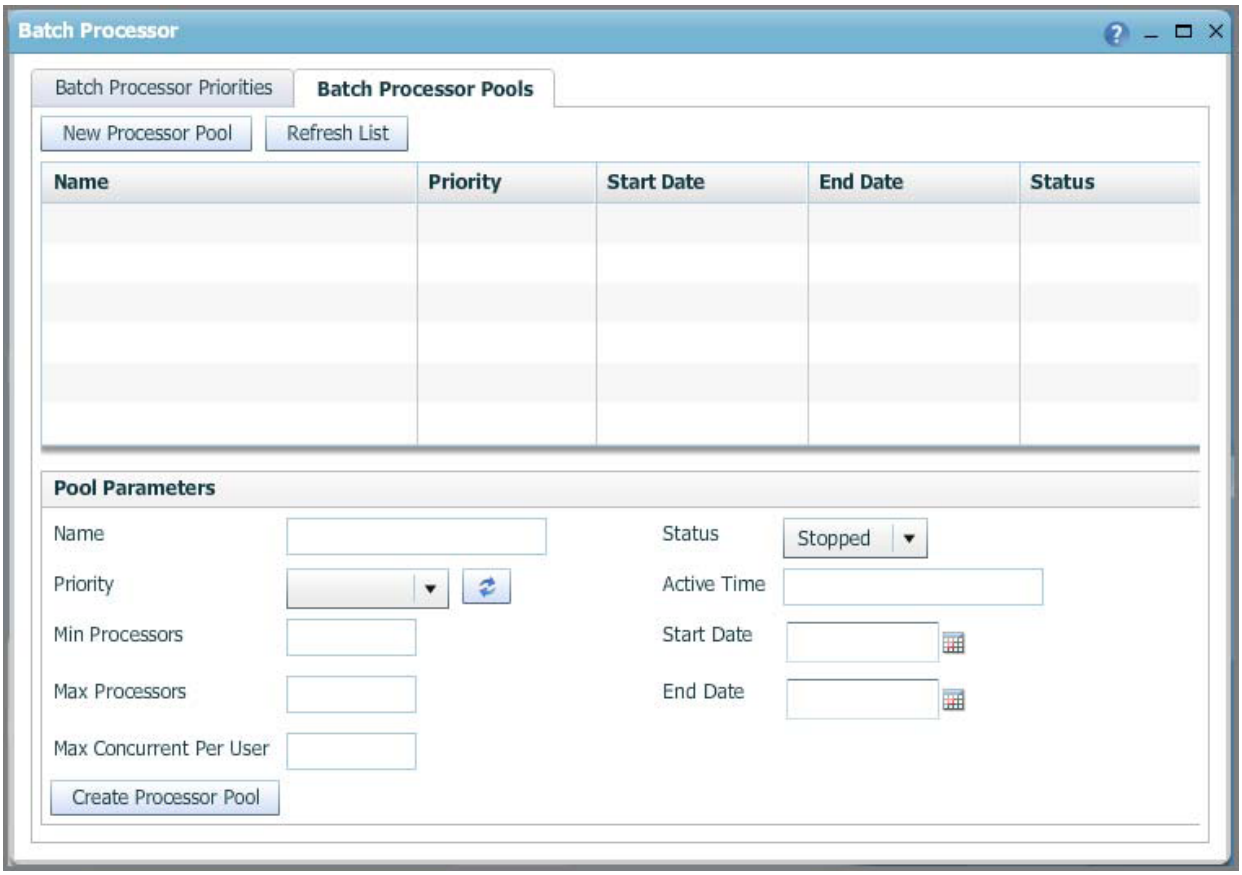
1. Go to the NaviPlan Operational Administration main page, and click **Batch Processor**.
2. From the list of priorities displayed in the upper section of the dialog box, select the batch priority you want to update.
3. Update the priority attributes, as required.
4. Click **Update Priority**.

Delete a batch processor priority

1. Go to the NaviPlan Operational Administration main page, and click **Batch Processor**.
2. From the list of priorities displayed in the upper section of the dialog box, select the batch priority you want to delete, and click **Delete**.
   Note: When you delete a priority, all processor pools associated with that priority will be deleted as well.

Batch processor pools

The ***Batch Processor Pools*** tab in the ***Batch Processor*** dialog box allows you to create, modify, and delete processor pool configurations. It also allows you to start and stop batch processor pools.
Note: When you stop a batch processor pool, any requests that are currently running will finish processing before the pool is shut down.



NaviPlan Operational Administration main page – Batch Processor button – Batch Processor dialog box – Batch Processor Pools tab

Create a batch processor pool

1. Go to the NaviPlan Operational Administration main page, and click **Batch Processor**.
2. Go to the ***Batch Processor Pools*** tab.
3. Click **New Processor Pool** at the top of the dialog box.
4. Enter the batch processor pool details.
5. Click **Create Processor Pool**.

Update an existing batch processor pool

1. Go to the NaviPlan Operational Administration main page, and click **Batch Processor**.
2. Go to the ***Batch Processor Pools*** tab.
3. From the menu of batch processor pools in the upper section of the dialog box, select the batch processor pool you want to update.
4. Update the required batch processor pool details, and click **Update Processor Pool**.

Delete a batch processor pool

1. Go to the NaviPlan Operational Administration main page, and click **Batch Processor**.
2. Go to the ***Batch Processor Pools*** tab.
3. From the list of batch processor pools in the upper section of the dialog box, select the batch processor pool you want to delete from the pool list, and click **Delete Processor Pool**.

Manage current site activities

Each time a user logs on to NaviPlan, a user session begins. The session lasts until either the user logs off of NaviPlan, or the session expires. Sessions expire when the user has been inactive in NaviPlan for a given period of time. Each user session is automatically given a number (a session ID) and is locked by NaviPlan. From the list of ***session locks***, the administrator can determine how many individuals are currently logged on to NaviPlan. If a user exits NaviPlan without logging out, the client files and plans in use when NaviPlan was exited remain locked until the expiration of that user's NaviPlan session.

Client files, engagements, and plans can only be accessed by one user at a time. While one user is working in a client file, engagement, or plan, it is locked and non-modifiable to other users. When users check out a client file to edit the file in NaviPlan Offline, the file is locked until the client file is checked in or released from NaviPlan Offline. These types of locks are considered user locks. If the locks are removed manually by the administrator, all unsaved or checked out changes are lost.

A session lock lasts for the duration of the user session and is automatically unlocked when the session ends. A user lock lasts until the user releases the lock (checks in or closes the client file).

The only time that an administrator would manually unlock client files, engagements, and plans is in the following cases:

- The NaviPlan application shuts down unexpectedly (locks may not be released).
- A user leaves the company unexpectedly and he or she has files locked.
- The offline application becomes inaccessible.

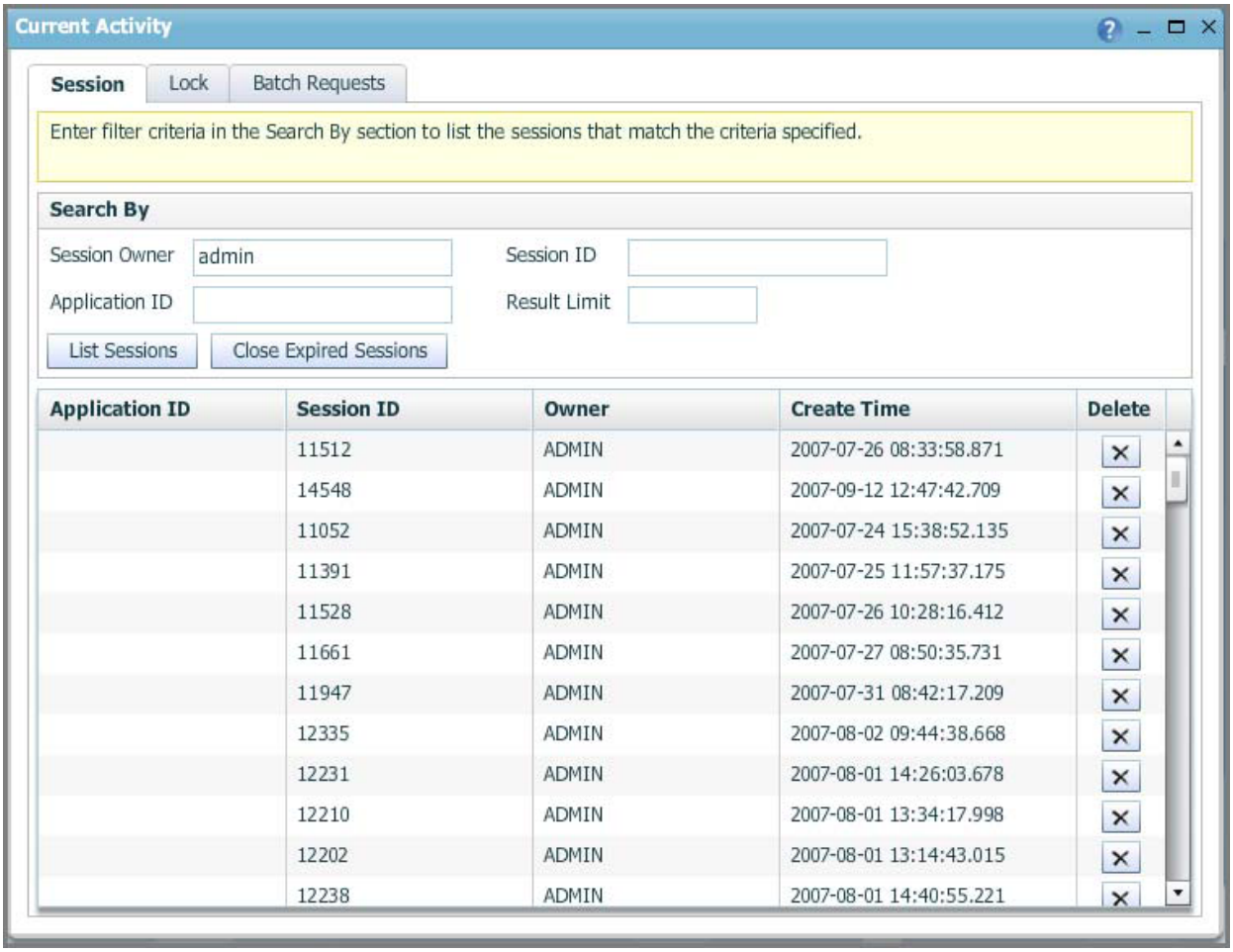
In the ***Current Activity*** dialog box, you can check which users are currently signed on to NaviPlan (view the list of user sessions), as well as end user sessions and unlock client files, engagements, and plans. For more information about managing user sessions, see the following procedures:

- **View a list of user sessions** on the next page
- **End user sessions** on page 67
- **Unlock client files, engagements, and plans** on page 68

View a list of user sessions

To view a list of users currently signed on to NaviPlan, follow these steps:

1. Go to the NaviPlan Operational Administration main page, and click **Current Activity**.
2. Do one of the following:
   - To search for a session of a particular user, enter that user's login name in the ***Session Owner*** field.
   - To search for a particular session, enter the identification number of the session in the ***Session ID*** field.
   - To search for sessions of a particular version of NaviPlan, enter that version in the ***Application ID*** field.
3. In the ***Result Limit*** field, enter the maximum number of sessions you want to view that meet your criteria.
4. Click **List Sessions**.



NaviPlan Operational Administration main page – Current Activity button – Current Activity dialog box – Session tab

End user sessions

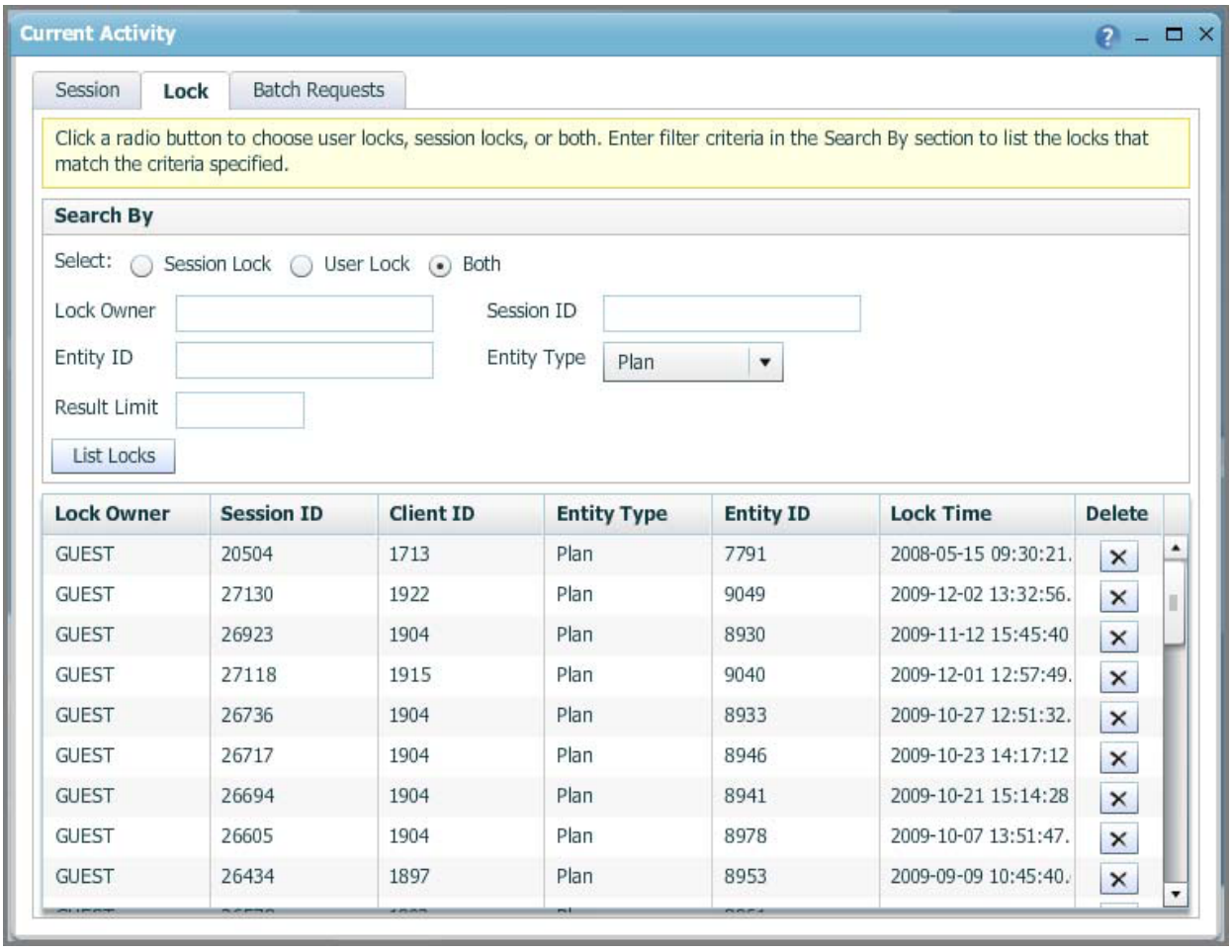
To end a user session, follow these steps:

1. Go to the NaviPlan Operational Administration main page, and click **Current Activity**.
2. Find the session you want to end. For more information, see **View a list of user sessions** on the previous page.
3. Under ***Delete***, click ✕ for the session you want to end.
   Note: Only delete session locks when you are 100% certain that it is a stale user session (i.e., the user did not log off NaviPlan properly). If you delete an active session, you will force that user to log off.
4. To close all the expired sessions, click **Close Expired Sessions**.

Unlock client files, engagements, and plans

To unlock a client file, engagement, or plan, follow these steps:

1. Go to the NaviPlan Operational Administration main page, and click **Current Activity**. The ***Current Activity*** dialog box opens to the ***Session*** tab. Go to the **Lock** tab.
2. Select **User Lock**.
3. If you know which user created the lock, enter that user's login name in the ***Lock Owner*** field.
4. If you know the ID number of the session in which the lock was created, enter it in the ***Session ID*** field.
5. From the ***Entity Type*** menu, select the item you want to unlock (a client file, plan, or engagement).
6. If you know the ID number of the item you want to unlock, enter it in the ***Entity ID*** field.
7. In the ***Result Limit*** field, enter the maximum number of locks you want to view that meet your criteria.
8. Click **List Locks**.
9. Under ***Delete***, click ✕ for the item you want to unlock.


Current Activity
Session
Lock
Batch Requests
Click a radio button to choose user locks, session locks, or both. Enter filter criteria in the Search By section to list the locks that match the criteria specified.
Search By
Select: Session Lock User Lock Both
Lock Owner
Session ID
Entity ID
Entity Type
Plan
Result Limit
List Locks
Lock Owner | Session ID | Client ID | Entity Type | Entity ID | Lock Time | Delete
GUEST | 20504 | 1713 | Plan | 7791 | 2008-05-15 09:30:21.
GUEST | 27130 | 1922 | Plan | 9049 | 2009-12-02 13:32:56.
GUEST | 26923 | 1904 | Plan | 8930 | 2009-11-12 15:45:40
GUEST | 27118 | 1915 | Plan | 9040 | 2009-12-01 12:57:49.
GUEST | 26736 | 1904 | Plan | 8933 | 2009-10-27 12:51:32.
GUEST | 26717 | 1904 | Plan | 8946 | 2009-10-23 14:17:12
GUEST | 26694 | 1904 | Plan | 8941 | 2009-10-21 15:14:28
GUEST | 26605 | 1904 | Plan | 8978 | 2009-10-07 13:51:47.
GUEST | 26434 | 1897 | Plan | 8953 | 2009-09-09 10:45:40.

NaviPlan Operational Administration main page – Current Activity button – Current Activity dialog box – Lock tab

Search batch requests

Go to the NaviPlan Operational Administration main page, and click **Current Activity**.

From the ***Current Activity*** dialog box, go to the ***Batch Requests*** tab.

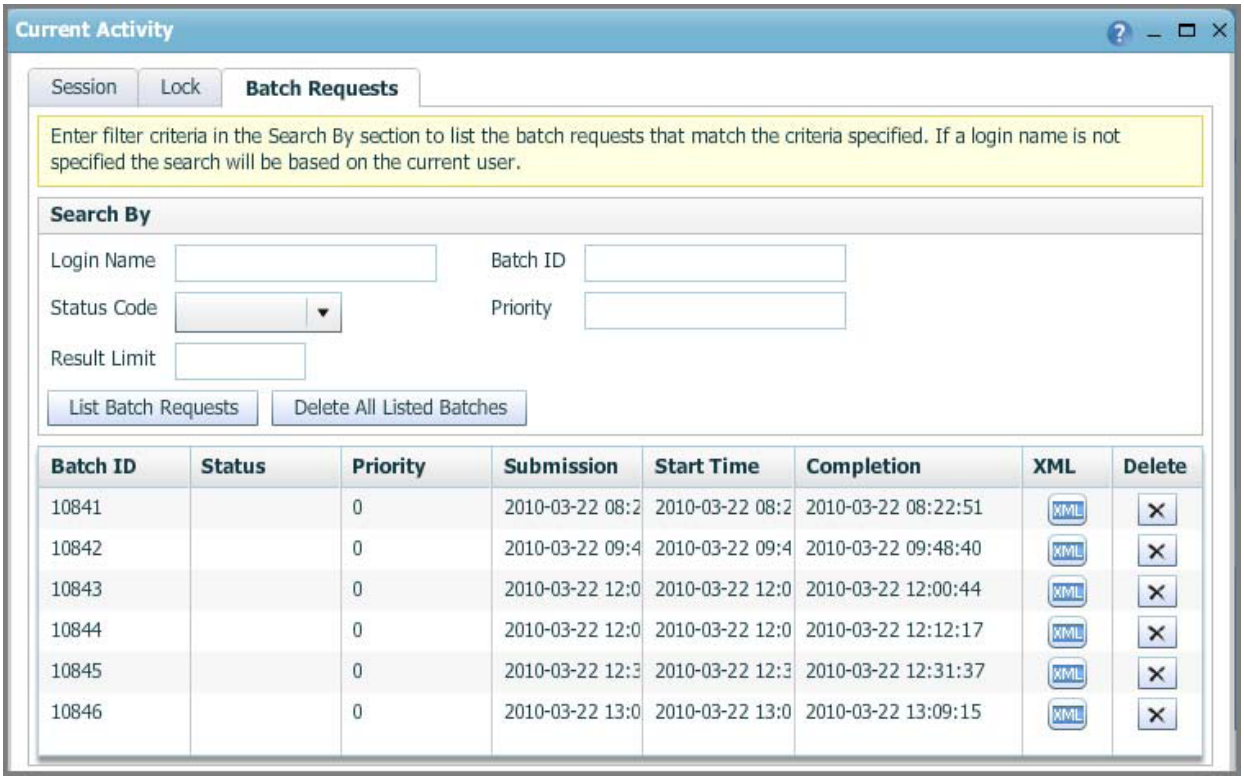
Enter the search criteria. You can filter the search based on the following criteria:

- ***Login Name***
- ***Batch ID***
- ***Status Code***
- ***Priority***
- ***Result Limit***

Click **List Batch Requests**.
Note: For each batch request, you can view the request/response XML by clicking the associated ***XML*** button under ***XML***. You can also delete individual batch requests from the queue by clicking ✕ under ***Delete***.

Delete filtered batches

1. Go to the NaviPlan Operational Administration main page, and click **Current Activity**.
2. From the ***Current Activity*** dialog box, go to the ***Batch Requests*** tab.
3. Enter the search criteria, and then click **List Batch Requests**.
4. To delete all batches that match the current search criteria, click **Delete All Listed Batches**.


Current Activity
Session
Lock
Batch Requests
Enter filter criteria in the Search By section to list the batch requests that match the criteria specified. If a login name is not specified the search will be based on the current user.
Search By
Login Name
Batch ID
Status Code
Priority
Result Limit
List Batch Requests
Delete All Listed Batches
Batch ID
Status
Priority
Submission
Start Time
Completion
XML
Delete
10841 0 2010-03-22 08:2 2010-03-22 08:2 2010-03-22 08:22:51
10842 0 2010-03-22 09:4 2010-03-22 09:4 2010-03-22 09:48:40
10843 0 2010-03-22 12:0 2010-03-22 12:0 2010-03-22 12:00:44
10844 0 2010-03-22 12:0 2010-03-22 12:0 2010-03-22 12:12:17
10845 0 2010-03-22 12:3 2010-03-22 12:3 2010-03-22 12:31:37
10846 0 2010-03-22 13:0 2010-03-22 13:0 2010-03-22 13:09:15

NaviPlan Operational Administration main page – Current Activity button – Current Activity dialog box – Batch Requests tab

View and modify application settings

Application settings can be viewed and modified in the ***Administrative Settings*** dialog box, which is opened by going to the NaviPlan Operational Administration main page, and clicking **Administrative Functions**.

- On the ***Logging*** tab, you can view and manage application logs.
- On the ***Application Settings*** tab, you can view and modify application settings.
- On the ***Site Management*** tab, you can package verification information as a ZIP file, load application XML templates, load or reload workflow details, package static Web content as a ZIP file, and reclaim unused memory (perform garbage collection).
  Note: Performing garbage collection may cause temporary delays in processing in the NaviPlan application, so this operation should not be performed during regular production hours.

Enter an XMLStore request

Clicking ***XMLStore Processor*** on the NaviPlan Operational Administration main page opens the ***XMLStore Processor*** dialog box where you can enter an XMLStore request.

There are three methods you can use to enter an XMLStore request:

- Manually enter the request in the text box, and click **Process XML**.
- Copy the request from an external XML file, paste it in the text box, and click **Process XML**.
- Click **Browse** to browse for an existing XML file, select it, and click **Submit**.

Exit the administrative site

To exit the administrative site and save changes, click **Logout** in the top-right corner of the screen. Do not close your browser without logging off first, or any changes made on the last screen you worked on may not be saved.

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